



## PMP AWARE Administrator User Guide

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# 1 Administrator User Guide

This user guide is intended to help PMP Administrators with the day-to-day tasks of managing their state's portal. It is divided into the subsections of the application for ease of use.

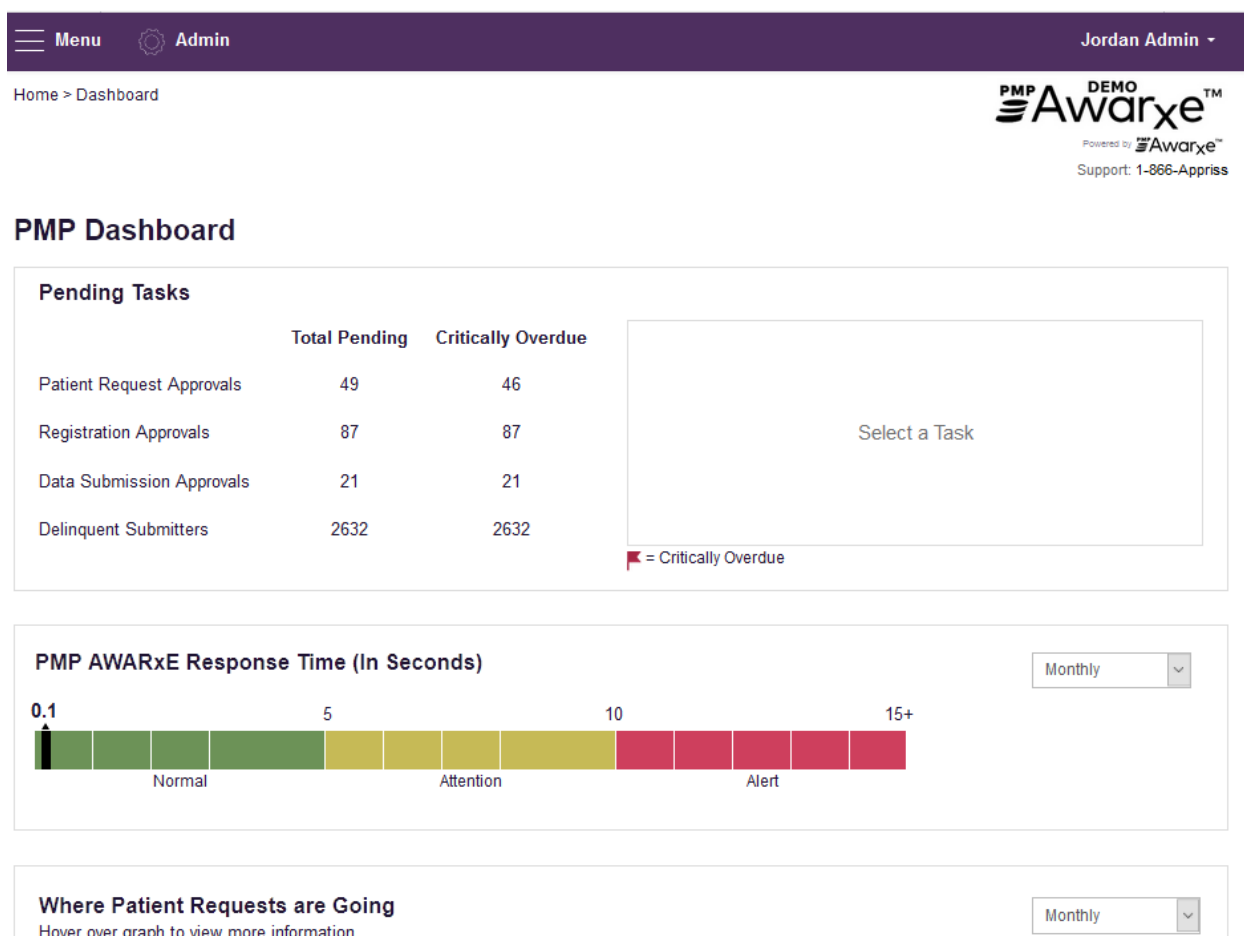
## 2 Home

The **Home** tab Contains 3 sections; Dashboard, Announcements, and Quick Links. These are all accessible by clicking Menu and clicking the individual link for the sections under the Home header.

The Dashboard is where users land once authenticated. The Announcements section is where any active announcements that were sent to individual users/roles/geographic groups are displayed, or available for modification/deletion/new entry. The Quick Links Section is where any links that are displayed on the User Dashboard can be modified.






### 2.1 Dashboard

The Administrator AWA<sub>x</sub>E Dashboard provides direct access to important pending tasks, and helpful statistics regarding the AWA<sub>x</sub>E site's response time: Top 3 Outbound PMPi states, Top 3 inbound PMPi states, and user activity. Response time and PMPi state data can be viewed Daily, Weekly, Monthly, Quarterly, or Yearly. User statistics can be viewed on a yearly basis.



### 2.1.1 Pending Tasks

The Pending Tasks section will provide the State Administrator with counts of pending tasks that require action. Simply click anywhere within the row of the task and its counts to see more details.

Pending Tasks					
	Total Pending	Critically Overdue	Patient Name	Request Date	Days Pending
Patient Request Approvals	49	46	Bob Testpatient	08/30/2016	509 
Registration Approvals	87	87	three Testpatient	02/28/2017	327 
Data Submission Approvals	21	21	three Testpatient	02/28/2017	327 
Delinquent Submitters	2632	2632	two Testpatient	03/03/2017	325 
			 = Critically Overdue		

Clicking the hyperlink associated with the subsection (for Patient Request Approvals, the patient's name, for Registration Approvals, the requester name, and for Data Submission Approvals, the organization name, and for Delinquent Submitters, the pharmacy name) will take you directly to the request or in the case of Delinquent Submitters, The Pharmacy Analysis report for the submitter.

**Patient Request Approvals:** You may have certain roles, such as law enforcement users, that require approval before they can view patient Rx search results. Clicking on a patient name will take you to the "Requests Processing" queue with that particular request visible for you to review. Once you approve or reject the request, the user will receive an email stating the request status with a link to take them to directly review the results, or the rejection reason. To see all pending requests, navigate to **Menu > RxSearch > Requests Processing**. For more information on processing these requests, see the [Requests Processing](#) section of this document.

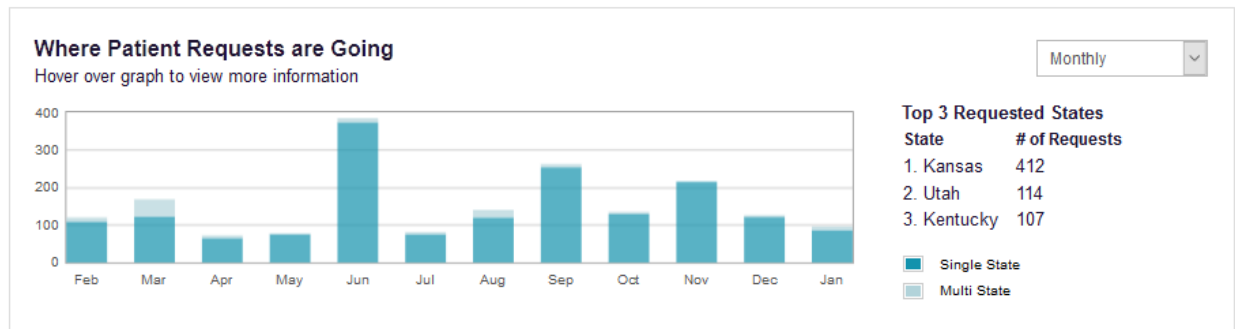
**Registration Approvals:** These are new users requesting access to the PMP AWARxE portal. They will not be able to perform any searches until you approve their account. Click a name to be taken directly to that user's profile in the registration table so that you can approve or reject their account. Once you approve or reject the user's account, they will receive an email regarding their status. To see all requests, navigate to **Admin > User Administration > Registration**. For more information, see the [User Administration](#) section.

**Data Submission Approvals:** This displays the number of data submitters that have registered to submit controlled substance reports to your state. "Data Submitter" is a broad term to describe entities that submit controlled substance reports to your state. These submitters can be individual pharmacies, pharmacy chains, 3rd party vendors, etc. The table that appears to the right offers a brief summary of the number of submitter accounts that are pending approval. The full table can be found under **Menu > Data > Accounts**. See the [Accounts](#) section for more information.

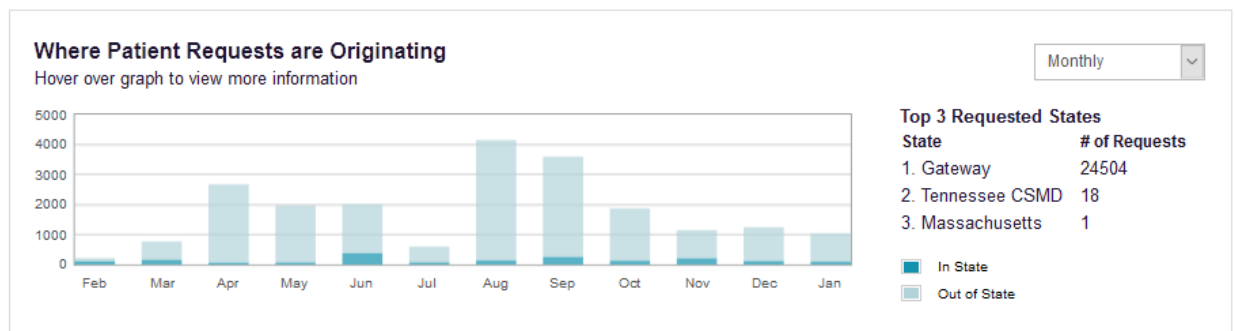
**Delinquent Submitters:** This provides a quick view of which submitters are non-compliant based upon the controlled substance submission reporting requirements your state has configured. To see the full list of delinquent submitters, navigate to **Admin > Compliance** and click the **Delinquent Pharmacies** tab. Additional details on how submitters are determined to be delinquent can be found in the [Compliance](#) section.

### 2.1.2 Statistics

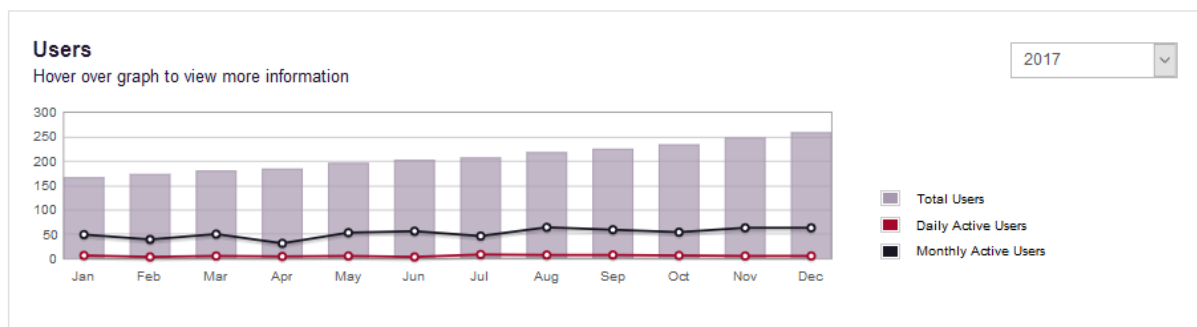
**Where Patient Requests Are Going** will provide statistics on the top three PMP Interconnect (PMPi) states your users are searching. It will provide a search count with the associated state and will separate the data within the graph by searches within the state or outside of the state. The default view is monthly, but this can be changed to daily, weekly, quarterly, or yearly.



**Where Patient Requests Are Originating** will provide statistics on the top three PMPi states that are querying your PMP. It will provide a search count with the associated state and will separate the data within the graph by searches within the state or outside of the state. The default view is monthly, but this can be changed to daily, weekly, quarterly, or yearly.



**Users** will provide user activity statistics on a yearly basis. It graphs Daily and monthly user activity in relation to total user count.



## 2.2 Announcements

As the PMP Administrator, you can configure site wide announcements that all users or select group(s) of users can see on their Dashboard or homepage when they login into AWARe. New requirements for licensure renewal or new state statutes regarding controlled substances can input as announcements for all users to view. These announcements are displayed directly to the user's dashboard and can also be sent via email.

To create an announcement, or view any active announcements, navigate to **Menu > Home > PMP Announcements**.

The screenshot shows the 'Announcements' section of the PMP system. At the top right is a '+ New Announcement' button. Below is a list of announcements. The first announcement is dated 12/08/2017, titled 'Test Announcement Single User', and has 'Please Disregard' as the message. It lists recipients: Andrew Kulinski (acekulinski@gmail.com, Physician MD, DO) and is set for statewide distribution via the dashboard. The second announcement is dated 10/26/2017, titled 'test', with the message 'www.cnn.com'. It lists recipients: Appriss Supervisor (mr.jonporter+physician@gmail.com, Physician MD, DO) and is set for statewide distribution via dashboard and email. Each announcement has 'Reuse' and 'Delete' buttons.

Any announcements that were previously sent but have not been deleted will be displayed here. Announcements will continue to display on a user's dashboard until they are deleted by an administrator.

To create a new announcement:

1. Click the "+New Announcement" button
2. Specify the recipients for your announcement
  - a. Add individual roles to the Recipients Box by selecting any or all of the roles in the box on the right and clicking add, or add all roles by clicking the "Add All" button

The screenshot shows the 'New Announcement' form. At the top left is the title 'New Announcement' and a 'Return to Announcements' link. Below is the 'Recipients' section, which contains a list of selected recipients: 'Child Protective Service' and 'Medical Examiner/Coroner'. To the right of this list are four buttons: 'Add', 'Remove', 'Add All', and 'Remove All'. To the right of these buttons is the 'Available recipients' section, which has a search box labeled 'filter available roles' and a list of roles: 'Restricted Admin', 'Benefit Plan Manager', 'VA Investigator', 'Board of Optometry Investigator', 'Medical Marijuana Registry', 'Licensed Social Worker', 'Licensed Addiction Counselor', and 'State Criminal Justice Department'.

- b. Select individual users as recipients, use the search box to search for users by first and last name. When the user comes up in your search, click on the row you wish to add to

add it to the list. You can then continue to search for additional users if needed. If you need to remove a user, click the “x” button to the right of the user’s information.

Individual users

jordan crawford

Jordan Crawford - jrcrawford+asd@gmail.com (Physician (MD, DO))

Jordan Crawford - jrcrawford@appriss.com (Prescriber Delegate - Unlicer

Jordan Crawford - jrcrawford+asd@gmail.com (Physician (MD, DO))

Jordan Admin - jrcrawford@apprisshealth.com (Admin)

Individual users are not bound by regions(3-digit ZIPs)

Note: You can also select a geographic area for your alert if necessary. You can select regions by the first 3 digits of the zip codes. Please note that this feature does not function with individual user announcements.

- c. Select your delivery method. Announcements will always be sent to the users’ dashboards but you have the option to send the announcement via email as well.
- d. Enter the subject and body of the message you want to send. Rich HTML can be used in the announcement.

Send PMP Announcement Via

☒ Dashboard

☐ Email(user’s registered system email)

Subject

Test Announcement

Message

This is a test.

Rich HTML Help

2985 chars left / 3000 character max

Send Now

Cancel

- e. Press the “Send Now” button. The application will confirm you want to send the announcement. Click “Confirm.”



- f. Any errors will be displayed on screen. Correct any errors and press “Send Now” again.

The screenshot shows the 'New Announcement' page in the PMP Awarxé Admin interface. The header includes a 'Menu' icon, 'Admin' text, and a user profile 'Jordan Admin'. The breadcrumb trail is 'Home > PMP Announcements'. The Awarxé logo and 'Powered by Awarxé' are in the top right, along with 'Support: 1-866-Appriss'. The main heading is 'New Announcement' with a link 'Return to Announcements'. A red error message states: '1 error prohibited this announcement from being saved:'. Below this, a bullet point reads: '• Select a role or individual user. Both can't be blank'. There are two input fields: 'Recipients' and 'Available recipients'. The 'Available recipients' field has a dropdown menu with 'filter available roles' and a list of roles including 'Restricted Admin'. A red 'Add' button is between the fields.

- g. You will be taken back to the Announcements page. A successful message and the new announcement will display on screen.

The screenshot shows the 'Announcements' page. At the top, a green success message box says: 'Success Announcement was successfully created.' with a 'DISMISS' button. Below this is the 'Announcements' heading and a '+ New Announcement' button. A table lists announcements. The first row shows '01/22/2018' with a 'NEW' tag, the title 'Test Announcement', and 'Reuse' and 'Delete' buttons. Below the table, the details of the announcement are shown: 'This is a test.', 'Recipients:', 'Individual users: Jordan Crawford - jrcrawford+asd@gmail.com (Physician (MD, DO)), Jordan Crawford - jrcrawford@appriss.com (Prescriber Delegate - Unlicensed)', 'Geographic Area: Statewide', and 'Send PMP Announcement Via: Dashboard'.

**Deleting Announcements:** If you wish to delete an old announcement, simply click the “delete” button next to the announcement. The application will ask you if you are sure, confirm and the announcement will be removed.

**Reusing Announcements:** If you wish to reuse an announcement, simply click the “Reuse” button next to the announcement. The system will of course retain all of your recipient and delivery settings, but they can be changed on screen. Make any changes if necessary, and click “Send Now” button and then the “Confirm” button.

## 2.3 Quick Links

Quick Links (links to external websites), can be configured so that users can quickly access other sites they may need in their daily work flows, directly from the users’ dashboard. Links to the state board of pharmacy website, or professional licensure boards might be sites you would add as Quick Links within AWARxE. This menu can be accessed via **Menu > Home > Quick Links**.

Create Quick Link

## Active Quicklinks

Please note: Only the first 4 links will be shown in the navigation menu. Users will need to click on **More Links...** in the navigation to view the full list.

Title	URL	Created On	Actions	
NPI Website	<a href="https://npiregistry.cms.hhs.gov/">https://npiregistry.cms.hhs.gov/</a>	02/11/2016 1:43 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Appriss	<a href="http://www.appriss.com">http://www.appriss.com</a>	04/05/2016 7:01 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Board of Pharmacy	<a href="https://nabp.pharmacy/boards-of-pharmacy/puerto-rico/">https://nabp.pharmacy/boards-of-pharmacy/puerto-rico/</a>	06/16/2016 6:15 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Board of Nursing	<a href="http://www.salud.gov.pr/Pages/Home.aspx">http://www.salud.gov.pr/Pages/Home.aspx</a>	02/10/2016 5:55 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Appriss Health Products	<a href="http://www.apprisshealthproducts.com">http://www.apprisshealthproducts.com</a>	01/09/2018 3:14 AM	<a href="#">Edit</a>	<a href="#">Delete</a>

To add a new link, click the “Create Quick Link” button.

### Create a new Quick Link

Title

Please note: A title more than 20 characters long will be shown as an ellipsis (e.g. State Department for Me...) in the navigation menu.

URL

Submit

Cancel

Enter your title and URL for the link, and click the “Submit” button.

You can edit or remove links at any time by clicking the “Edit” or “Delete” link in the Actions section of Quick Links.

## 3 Data

The Data section of the application is where data submitter user approvals are managed (Accounts section), where manual patient consolidation or deconsolidation can be performed (Consolidation section), and where administrators can review outstanding errors for data submitters as well as modify existing prescriptions and create new prescriptions if needed (Rx Management section).

### 3.1 Accounts

To access data submitter accounts, navigate to **Menu > Data > Accounts**

You can pull up all accounts by clicking “Search.”

You can pull up accounts needing approval by clicking “Advanced Options” and clicking the radio button for “Pending” in the Status section, or all rejected accounts by clicking the “Rejected” radio button.

Advanced Options ▾

Account:

DEA:

City:

State:  ▾

Primary User Email:

Status: ☐ Rejected ☐ Pending ☐ Approved

Accounts can also be filtered by name on the account, as well as city, state, zip code, and primary user email address. Please note that the results are going to be dependent on what was entered by the user upon registration.

**Note:** If you have Dispenser DEA Registration turned on (a feature that requires all clearinghouse users to enter any associated DEA numbers on their registration prior to approval) you will also be able to search by DEA number.

Advanced Options ▾

ACCOUNT STATUS
pending

### Accounts

Select an account to review details.

Account	Address	City	State	Zip Code	Phone Number	Request Date	Status
Pioneer Rx Pharmacy Software	408 Kay Lane	Shreveport	LA	71115	3187971717	05/16/2016 3:22 PM	Pending
SKENDERIAN APOTHECARY	1613 CAMBRIDGE ST	CAMBRIDGE	MA	02138	6173545600	05/18/2016 7:28 PM	Pending
JOHN SMITH	789, BEACH AVENUE	TULSA	OK	74137	9182341234	07/07/2016 1:04 PM	Pending
PDX	101 JIM WRIGHT FREEWAY	FORT WORTH	TX	76262	8172466760	09/12/2016 2:59	Pending

Click anywhere within the row for the account to manage it. All Data Submitter accounts can be approved or rejected at any time, regardless of whether they are currently in an Approved, Pending, or Rejected state.

Advanced Options ▾
ACCOUNT STATUS pending
Search

### Accounts

Select an account to review details.

Account	Address	City	State	Zip Code	Phone Number	Request Date	Status
Pioneer Rx Pharmacy Software	408 Kay Lane	Shreveport	LA	71115	3187971717	05/16/2016 3:22 PM	Pending
SKENDERIAN APOTHECARY	1613 CAMBRIDGE ST	CAMBRIDGE	MA	02138	6173545600	05/18/2016 7:28 PM	Pending
JOHN SMITH	789, BEACH AVENUE	TULSA	OK	74137	9182341234	07/07/2016 1:04 PM	Pending
PDX	101 JIM WRIGHT FREEWAY	FORT WORTH	TX	76262	8172466760	09/12/2016 2:59	Pending

JOHN SMITH

Reject
Approve

Phone: 9182341234  
Address: 789, BEACH AVENUE, TULSA, OK 74137  
Primary Username: OKCSR TEST  
Primary User Email: okcsrtest@outlook.com  
Account DEAs:

### 3.2 Consolidation

Within the Consolidation, you can manually combine or separate patient records. To consolidate or deconsolidate patients:

1. Navigate to **Menu > Data > Consolidation**
2. Click “Advanced Options” and enter your search criteria.
  - a. Enter the patient name by first and last name. Birthdate is not required for your search but can help to narrow down results. First name requires at least one character and last name requires at least two characters. You can enter % signs as wildcards if needed. Click search.

### Patient Groups

+ New Group

Advanced Options ▾
FIRST NAME alex LAST NAME doe
Search

First Name: alex
Last Name: doe
Birthdate: MM/DD/YYYY

- Any associated patient records will be displayed. For the below example, we have a set of two patients that were combined into one, so we will need to deconsolidate these patients.

### Patient Groups

+ New Group

Advanced Options ▾
FIRST NAME alex LAST NAME doe

Search

name:alex doe

+ Group 2078

- Expand the group(s) by clicking the plus sign.

### Patient Groups

+ New Group

Advanced Options ▾
FIRST NAME alex LAST NAME doe

Search

name:alex doe

- Group 2078

**Alex Doe** ♂ 1/1/00  
PHONE: 9641798785 SSN: I8DjDHbwJGMHcGXpYPRL DLN:  
CROWLEY ALLEY 10, MARICOPA, AZ 97475  
PRESCRIBER DEA: BL2018871  
PHARMACY IDENTIFIER: DEA: BC5312462

**Alex Lori Doe** ♀ 1/1/00  
PHONE: 3050384784 SSN: DLN:  
WAUBESA WAY 60, LAGUNA NIGUEL, AZ 44720  
PRESCRIBER DEA: BC6117546  
PHARMACY IDENTIFIER: DEA: FW1048710

**Alex Doe** ♂ 1/1/00  
PHONE: SSN: DLN:  
2351 NELSON MILLER PKWY , LOUISVILLE, KY 40223  
PRESCRIBER DEA: RW5555555  
PHARMACY IDENTIFIER: DEA: WG5555555

- Here we have patients with the same first name, last name, and birthdate, but different genders, addresses, and identifiers. To break the consolidation between these patients, we need to add **two** new separate groups and move the patients between them. If we don't move them into two separate groups and instead pull one out into one new group, the next time a patient record is received, they will continue to be consolidated.
- We would click and drag the first and third (male) record to Group 2079, and move the second (female) record to Group 2080.

## Patient Groups

+ New Group

Advanced Options ▾

FIRST NAMEalexLAST NAMEdoe

Search

name:alex doe

Group 2078

Alex Doe ♂1/1/00

PHONE: 9641798785 \$SN:  
I8DjDHbWJGMHcGXpYPRL DLN:  
CROWLEY ALLEY 10, MARICOPA, AZ 97475

PREScriBER DEA: BL2018871  
PHARMACY IDENTIFIER: DEA: BC5312462

Alex Lori Doe ♀1/1/00

PHONE: 3050384784 \$SN: DLN:  
WAUBESA WAY 60, LAGUNA NIGUEL, AZ  
44720

PREScriBER DEA: BC6117546  
PHARMACY IDENTIFIER: DEA: FW1048710

Alex Doe ♂1/1/00

PHONE: \$SN: DLN:  
2351 NELSON MILLER PKWY , LOUISVILLE,  
KY 40223

PREScriBER DEA: RW5555555  
PHARMACY IDENTIFIER: DEA: WG5555555

New Group

Group 2079

New Group

Group 2080

Discard Changes

Consolidate

- If you've made a mistake and need to start over, you can click "Discard Changes." This will return you to the search page. If you are ready to complete the deconsolidation, click the "Consolidate" button.
- Consolidation is very similar to de-consolidation. For example:

## Patient Groups

+ New Group

Advanced Options ▾

FIRST NAMEbobLAST NAMEtestpatientBIRTHDATE01/01/1900

Search

name:bob testpatient

Group 2084

Group 2083

Group 2082

Group 2081

- For this patient we would expand the patient groups, and review the records to determine whether this is the same person.

14

## Patient Groups

+ New Group

Advanced Options ▾

FIRST NAMEbobLAST NAMEtestpatientBIRTHDATE01/01/1900

Search

name:bob testpatient

Group 2084

BOB TESTPATIENT ♀1/1/00

PHONE: 6205551111 SSN: DLN: K00000000

1023 NOT REAL ST, WITCHITA, KS 67203

PRESCRIBER DEA: XR1111111

PHARMACY IDENTIFIER: DEA: ZZ1234567

Group 2083

Group 2082

BOB TESTPATIENT ♂1/1/00

PHONE: SSN: DLN: B98575814

1023 NOT REAL STREET, WITCHITA, KS 67203

PRESCRIBER DEA: AD1111119

PHARMACY IDENTIFIER: DEA: AP1111119

Group 2081

Bob Testpatient1/1/00

PHONE: SSN: 123990000 DLN:

1023 NOT REAL STREET , WITCHITA, KS 67203

PRESCRIBER DEA: AD1111119

DEA: DM1234567

10. In the event that they are all for the same person, we can click “New Group” to combine all the records.

## Patient Groups

+ New Group

Advanced Options ▾

FIRST NAME bob

LAST NAME testpatient

BIRTHDATE 01/01/1900

Search

name:bob testpatient

Group 2084

BOB TESTPATIENT ♀ 1/1/00

PHONE: 6205551111 SSN: DLN: K00000000

1023 NOT REAL ST, WITCHITA, KS 67203

PREScriBER DEA: XR1111111

PHARMACY IDENTIFIER: DEA: ZZ1234567

Group 2083

Group 2082

BOB TESTPATIENT ♂ 1/1/00

PHONE: SSN: DLN: B98575814

1023 NOT REAL STREET, WITCHITA, KS 67203

PREScriBER DEA: AD1111119

PHARMACY IDENTIFIER: DEA: AP1111119

Group 2081

Bob Testpatient 1/1/00

PHONE: SSN: 123990000 DLN:

1023 NOT REAL STREET , WITCHITA, KS 67203

PREScriBER DEA: AD1111119

DEA: DM10107510

New Group

Group 2085

Discard Changes

Consolidate

- Click and drag the records to the new group. You can drag an individual patient record, or the entire group.
- Once you have made your changes, click Save Changes to consolidate the patients.

**Note:** PMP AWA<sub>R</sub>x<sub>E</sub> will automatically generate certain consolidation requests for review, based on patient searches performed by your users. If a patient request results in a picklist to determine the patient they are searching for, a request will be generated. These can be handled as described above. For more information, see the [Requests Processing](#) section.

### 1.3 Rx Management

Rx Management is a feature that was created for pharmacy users, and is accessible by administrators. It is broken into 5 sections:

- Error Correction:** Errors on dispensations submitted to the PMP via PMP Clearinghouse can be reviewed (and corrected by end users, if so configured in the PMP. For more details, see the Configuration Guide). For administrator purposes, administrators have the ability to enter a DEA Number (or NCPDP number if this is a required field or the default identifier for pharmacies) to review any outstanding errors for an identifier, or view a specific error for a prescription.
- Rx Maintenance:** Any prescription that displays in an AWA<sub>R</sub>x<sub>E</sub> site can be modified at any time in this section. When used by a state administrator, this is typically used to void a prescription



that should not display in the application or to modify incorrect data on a prescription (ex. incorrect prescriber DEA number/name) in sensitive situations.

3. **New Rx:** This is a Universal Claim Form to add a new prescription into the database. This is typically used by administrators to add data for demo or testing purposes.
4. **PharmacyRx:** The PharmacyRx subsection will display on state administrator accounts, but as it requires the user account to have an employer DEA associated with it, if the account doesn't have a DEA number the administrator will not be able to use this feature. Please note there is no subsection below for further instructions on this feature.
5. **PharmacyRx History:** This section provides a searchable table of previously submitted PharmacyRx reports by end users. If your users are not configured to use Rx Management, nothing will display.

### 1.3.1 Error Correction


To view errors on prescriptions submitted to the PMP:

1. Navigate to **Menu > Data > Rx Management** and select the **Error Correction** tab
2. Click the "Advanced Options" button to enter your search criteria.
3. Enter a pharmacy identifier: Generally the DEA number of the pharmacy unless your state requires NCPDP or NCPDP is the default identifier
4. Enter a prescription number if you are looking for a specific prescription
5. Enter the appropriate start date and end date for your search
6. Click "Search"

Data > Rx Management > Error Correction

PMP DEMO

Awarxe™

Powered by Awarxe™

Support: 1-866-Appriss

Error Correction

Rx Maintenance

New Rx

PharmacyRx

PharmacyRx History

Advanced Options ▾

PHARMACY IDENTIFIER

FA5306128

START DATE

01/01/2017

END DATE

01/22/2018

Search

Pharmacy Identifier:

FA5306128


RX Number:


Fill Start Date:

01/01/2017

Fill End Date:

01/22/2018

Download PDF

Download CSV

Any applicable errors for your search will be displayed on screen. If there are no errors for the identifier for the given date range, you will see a "No errors found for your selected employer identifiers" message.

Advanced Options ▾

PHARMACY IDENTIFIER

FA5306128

START DATE

01/01/2017

END DATE

01/22/2018

Search

Rx Error List

Download PDF

Download CSV

Displaying 1 of 1

Rx Number	Date Filled	Pharmacy Name	Pharmacy DEA	Pharmacy NCPDP	Errors
1096575	11/13/2017	ACCREDITO HEALTH GROUP, INC.	FA5306128		2

- If you would like to review the error, you can click on the prescription number in the Rx Number column. This will pull up a Universal Claim Form with the errors indicated in red on the form.

Prescriber

First Name\*

GINA

Address One

Prescriber DEA #\*

Dea number must be a valid identifier.  
Dea number value must be present.

Middle Name

Address Two

Prescriber XDEA #

Last Name\*

City

1.3.2 Rx Maintenance

To modify or void a prescription:

- Navigate to **Menu > Data > Rx Management** and select the **Rx Maintenance** tab
- Enter your search criteria. You can enter at minimum the pharmacy identifier and fill date range, but you can narrow down the results by prescription number or by prescriber last name
- Click Search

### Rx Search

\*Requires at least one Pharmacy Identifier and Rx Fill Dates

#### Prescriptions Number

Rx Number

#### Prescriber

Last Name

#### Pharmacy Identifiers

#### Prescriptions Fill Dates

From \*

To \*

- Prescriptions matching your search will be displayed on screen. If no prescription was found, you will receive a “No Prescriptions Found” message.

### Rx Search Results

Identifier(s): AP1111119  
Rx Fill Dates: 05/01/2017-01/22/2018

Displaying 1 entry

Rx Number	Date Filled	Written At	Patient Name	Prescriber	Pharmacy Name	Pharmacy Identifier
123	2017-08-07	2017-08-07	Spot Patient	Appriss Doc	Appriss	AP1111119

- Select the prescription for editing by clicking the prescription number in the Rx Number column. This will display a Universal Claim Form for editing.

## Dispensation Correction Form

**Patient**

<b>Patient Type:</b> <input type="radio"/> Human <input checked="" type="radio"/> Animal	<b>Animal Name*</b> Spot	
<b>First Name*</b> Spot	<b>Address*</b> 10401 LINN STATION RD	<b>ID Type</b> 
<b>Middle Name</b> 	<b>Address Line 2</b> STE 200	<b>ID Number</b> 
<b>Last Name*</b> Patient	<b>City*</b> LOUISVILLE	<b>Patient Location</b> 
<b>DOB*</b> 01/01/2010	<b>State*</b> Kentucky	<b>Phone Number</b> 8662777477
<b>Gender*</b> Male	<b>Postal Code*</b> 40223	

**Pharmacy**

<b>Pharmacy Name*</b> Appriss	<b>Pharmacy DEA #*</b> AP1111119
<b>Address*</b> 10401 LINN STATION RD	<b>Pharmacy NPI #</b> 

6. Make any changes necessary on the Dispensation Correction Form, scroll down to the bottom and click "Submit."
7. If you need to void the prescription, scroll down to the bottom and click "Void."

**Last Name**

**Submit** **Cancel** **Void**

8. Select the void reason, and click "Void" This will remove the prescription. This cannot be undone.

Prescriber NPI #

## Void Dispensation ×

Are you sure you want to void this dispensation? This is a permanent change.

Please enter a void reason:

### 1.3.3 New Rx

If you need to add a new prescription:

1. Navigate to **Menu > Data > Rx Management** and click the **New Rx** tab
2. Enter all required fields on the Manual Submission Form

Support: 1-866-Appriss

#### Manual Submission Form

**− Patient**

<b>Patient Type:</b> <input type="radio"/> Human <input type="radio"/> Animal		<b>Animal Name*</b> <input type="text"/>
<b>First Name*</b> <input type="text"/>	<b>Address*</b> <input type="text"/>	<b>ID Type</b> <input type="text"/>
<b>Middle Name</b> <input type="text"/>	<b>Address Line 2</b> <input type="text"/>	<b>ID Number</b> <input type="text"/>
<b>Last Name*</b> <input type="text"/>	<b>City*</b> <input type="text"/>	<b>Patient Location</b> <input type="text"/>
<b>DOB*</b> <input type="text" value="mm/dd/yyyy"/>	<b>State*</b> <input type="text" value="Select State"/>	<b>Phone Number</b> <input type="text"/>
<b>Gender*</b> <input type="text" value="Unknown"/>	<b>Postal Code*</b> <input type="text"/>	

3. Ensure valid values are entered for pharmacy, prescriber, and drug identifiers
4. Click Submit. If there are no errors, the prescription will be entered into the PMP. If there are errors, correct any errors and click submit again. (Ex. Invalid DEA number)

### 1.3.4 PharmacyRx History

To review your users' PharmacyRx searches:

1. Navigate to **Menu > Data > Rx Management** and Click the **PharmacyRx History** tab

[Error Correction](#)
[Rx Maintenance](#)
[New Rx](#)
[PharmacyRx](#)
[PharmacyRx History](#)

Advanced Options ▾ Search using Advanced Options

### PharmacyRx History

Dispensary	Requestor First Name	Requestor Last Name	Date Requested	Identifier
SPRINGFIELD FAMILY PHARMACY, INC.	Jon	Pharmacist	07/10/2017 02:39 PM	DEA: FS4671601
SPRINGFIELD FAMILY PHARMACY, INC.	Jon	Pharmacist	07/10/2017 03:12 PM	DEA: FS4671601
SPRINGFIELD FAMILY PHARMACY, INC.	Jon	Pharmacist	07/11/2017 02:21 AM	DEA: FS4671601
AMERICUS PHARMACY	Jon	Pharmacist	07/14/2017 04:07 PM	DEA: BA2557621

2. All results will be displayed. If you need to narrow down your results, click the “Advanced Options” button
3. Filter by Requester name, date range, dispensary name, DEA, NPI or NCPDP number, and click search

Advanced Options ▾

Requestor First Name:

Requestor Last Name:

Requested From:

Requested To:

Dispensary:

DEA:

NPI:

NCPDP:

Requestor First Name	Date Requested	Identifier
	08/21/2017 09:55 AM	DEA: FS46716
	08/23/2017 03:37 PM	DEA: FS46716
	09/14/2017 02:52 PM	DEA: FL11728
	09/25/2017 07:34 PM	DEA: KY55555
	11/17/2017 08:40 PM	DEA: FL11728
LONGS DRUG STORES CALIFORNIA, L.L.C.	11/28/2017 02:34 PM	DEA: FL11728

4. Filtered Results will be displayed on screen.

[Error Correction](#)
[Rx Maintenance](#)
[New Rx](#)
[PharmacyRx](#)
[PharmacyRx History](#)

Advanced Options ▾

### PharmacyRx History

Dispensary	Requestor First Name	Requestor Last Name	Date Requested	Identifier
LONGS DRUG STORES CALIFORNIA, L.L.C.	Jon	Pharmacist	11/28/2017 02:34 PM	DEA: FL1172890

## 4 Rx Search

The RxSearch section is where all things patient are housed. There are several features available here, however this guide will only cover those that are applicable to administrators. For features like Patient Search and Bulk Patient Search, please see the available instructions in your individual state's user guide by clicking **Menu > Training > AWAxE User Guide**.

### 4.1 Requests History

State administrators have access to view all user patient searches and their results at any time. They can be filtered by many fields, like date range, the user performing the search, and the patient that was searched.

To review search history:

1. Navigate to **Menu > RxSearch > Requests History**. The most recent requests will be displayed.

Advanced Options ▾

Search using Advanced Options

Search

Requests History

Select a patient to review details about the request.

Download PDF

Download CSV

Patient First Name ▾	Patient Last Name ▾	Requestor ▾	Requested For ▾	Request Type ▾	Status ▾	Date Requested ▾
three	testpatient	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:53 PM
JOE	BENZ-OPIOID	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:28 PM
three	testpatient	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:27 PM

2. To filter search history, click Advanced Options. You can filter by all of the options below. You can also exclude any Gateway requests from your search if necessary. Then, click Search.
  - a. **Note:** If you are trying to view only your own searches, enter your name in the First and Last Name fields.

Advanced Options ▾ **EXCLUDE GATEWAY** Yes **REQUEST BEGIN DATE** 01/19/2018 **REQUEST END DATE** 01/19/2018 **Search**

**Common Search Options:**

First Name  Last Name

Search for: ☐ Requestor Name ☐ Patient Name

Patient Date of Birth

Request Begin Date  Request End Date

DEA  NPI

External Requestor Role

Search for: ☐ Shared Report

**Gateway Request Search Options:**

☒ Exclude Gateway Requests

Licensee Name  Facility Name

Download PDF Download CSV

Request Type ▾	Status ▾	Date Requested ▾
AWARxE	Pending	01/22/2018 7:23 PM
AWARxE	Complete	01/22/2018 5:42 PM
AWARxE	Complete	01/22/2018 5:42 PM
AWARxE	Complete	01/22/2018 5:42 PM
AWARxE	Complete	01/22/2018 5:42 PM
AWARxE	Pending	01/22/2018 5:42 PM

Last »

- Results will be displayed on screen. If you want to remove any of the search criteria you can modify again by clicking Advanced Options, or click on the search filter you want to remove in the Advanced Options bar and press the delete button.
- To view more details on the request, click anywhere in the row of the request.

Advanced Options ▾ **REQUEST BEGIN DATE** 01/19/2018 **REQUEST END DATE** 01/19/2018 **EXCLUDE GATEWAY** Yes **Search**

**Requests History**

Select a patient to review details about the request.

Download PDF Download CSV

Patient First Name ▾	Patient Last Name ▾	Requestor ▾	Requested For ▾	Request Type ▾	Status ▾	Date Requested ▾
three	testpatient	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:53 PM
JOE	BENZ-OPIOID	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:28 PM
three	testpatient	Appriss Supervisor		AWARxE	Complete	01/19/2018 5:27 PM
keith	wilson	inspector gadget		AWARxE	Pending	01/19/2018 3:56 PM
keith	wilson	inspector gadget		AWARxE	Pending	01/19/2018 3:56 PM

**three testpatient** **View** **Refresh**

DOB: 01/01/1900  
Location: COFFEYVILLE ,KS 67337  
Other States:  
Reason:  
Prescription Fill Dates: January 11, 2017 until March 12, 2017

- The patient name, requestor name, and request date will be displayed in the table, additional information like patient birthdate, patient location data supplied in the search, or PMPi states requested in the search will display at the bottom of the screen.
- You can view the results of the requester's search by clicking the "View" button at the bottom of the page. If you wish to run a new report for that same patient, you can click the "Refresh"



button to run another search. This search will only be associated with your account and will not be viewable by the original requester.

## 4.2 Requests Processing/Requests Approval

The Requests Processing section is where any user requests that require approval (for example, if your state allows law enforcement users access but requires that those requests be approved by an administrator) in addition to Multiple Patient (consolidation) Requests, which are simply manual requests for consolidation that are generated automatically when a user searches for a patient and their search results in a picklist due to unconsolidated patients, are housed. These requests can be filtered, simply click “Advanced Options” and you can select the radio button for “Requires Approval” to see pending requests awaiting approval, or click “Multiple Patients” to see any outstanding consolidation requests.

**Note:** Multiple Patient requests are not requests where users are waiting for information, unless your state has the delayed patient picklist feature active so that users are barred from selecting from multiple patients. If you do not have that feature turned on, your users were able to access the patient report, and any consolidation efforts taken thereafter will prevent a picklist from being displayed the next time this patient is searched.

**Note:** There is an additional section in the RxSearch section of the application called “Requests Approval.” This section is available for granting access to approve requests to other roles. On a state administrator account it will display the same requests that are located in Requests Processing.

Advanced Options ▾

Search using Advanced Options

Search

Requests Processing

Select a request to review details about the request.

Patient First Name ▾	Patient Last Name ▾	Requestor ▾	Date Requested ▾	Reason ▾
test	patient	Andrew Kulinski	01/22/2018 7:23 PM	User Permissions, Multiple Patient
test	patient	Andrew Kulinski	01/22/2018 5:42 PM	Multiple Patient
test	patient	Andrew Kulinski	01/22/2018 5:42 PM	Multiple Patient
test	patient	Andrew Kulinski	01/22/2018 2:58 PM	Multiple Patient
luk	skywalker	Andrew Kulinski	01/22/2018 2:46 PM	User Permissions, No Patient Found
test	patient	Andrew Kulinski	01/22/2018 2:46 PM	User Permissions, No Rxs Found in Date Range

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...

Next >

Last >>

### 4.2.1 Requires Approval

To process a search request that is pending approval:

1. Navigate to **Menu > Rx Search > Requests Processing**
2. All pending requests will be displayed. If you want to view only requests that require approval, filter by request type: Requires Approval; you can also add a patient or requester name in the Advanced Options filter if necessary, as well as a request date.
3. Click anywhere within the row for the request. Additional information will be displayed below.

Advanced Options
APPROVAL STATUS REASON requires approval
Search

### Requests Processing

Select a request to review details about the request.

Patient First Name	Patient Last Name	Requestor	Date Requested	Reason
john	doe	Local Police	12/15/2017 5:13 PM	User Permissions
john	doe	Local Police	12/11/2017 9:03 PM	User Permissions
alice	testpatient	Local Police	12/07/2017 7:01 PM	User Permissions
john	doe	Officer One	12/06/2017 3:54 PM	User Permissions
john	doe	Officer One	12/06/2017 3:54 PM	User Permissions
john	doe	Officer One	12/06/2017 3:54 PM	User Permissions

1
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Next
Last

alice testpatient
Reject...
Approve

DOB: 01/01/1900  
Location:  
PMPi states:  
Reason: User Permissions  
Case Number: 46452  
Case info: [view](#)  
Prescription Fill Dates: December 07, 2016 until December 07, 2017

4. If required by your state:
  - a. you can view case information by clicking on the Case Number hyperlink:

alice testpatient

Case Number: 46452

Comment:

AA #2

Reason: User Permissions

Case Number: 46452


Case info: [view](#)

- b. You can view any uploaded documentation by clicking the “View” link. Note: click the “View” link again to close the Case Upload pop-up.

**Case Number: 46452**

AA #2

Choose files... [Max File Size: 15MB]



ASAP\_PDMP\_V4.2A\_(062817)\_Pg23.pdf (53 KB)  
 Uploaded 1 month, 2 weeks, 1 day, 5 hours, and 26 minutes ago

Case Number: 46452  
 Case info: [view](#)

- To act upon the request, click Reject or Approve. If rejecting, a rejection reason will need to be entered. Once entered, click "Reject Request."

### Rejecting a Patient Request X

Rejection Reason

Not a valid case documentation upload, please upload a subpoena

Cancel

Reject Request

#### 4.2.2 Multiple Patient

To act upon multiple patient requests:

- Navigate to **Menu > Rx Search > Requests Processing**
- All pending requests will be displayed. If you want to view only Multiple Patient requests, filter by request type: Multiple Patient; you can also add a patient (or requester name) in the Advanced Options filter if necessary, as well as a request date.
- Click anywhere within the row for the request

4. Click “Multiple Patients...”
5. Expand the patient groups and review the individual patient records to determine whether they are for the same patient.
  - a. If they are for the same patient, consolidate the patients by clicking “New Group” and dragging the matching patient records into the new group.
  - b. If they are not for the same patient and you do not wish to consolidate any of the patient records, click the “Reject...” button.

**Requests Processing**

### Patient Groups

+ New Group

- Group 2073

Test Patient ♂ 1/1/00  
 PHONE: 2137693503 SSN: DLN:  
 9701 MONROVIA ST, OVERLAND PARK, KS 66215  
 PRESCRIBER DEA: MT1111119  
 PHARMACY IDENTIFIER: DEA: AC1111119

Test Patient ♂ 1/1/00  
 PHONE: 2137693503 SSN: DLN:  
 9701 MONROVIA ST, OVERLAND PARK, KS 66215  
 PRESCRIBER DEA: BT1111119  
 PHARMACY IDENTIFIER: DEA: AA1111119

Test Patient ♂ 1/1/00  
 PHONE: 2137693503 SSN: DLN:  
 9701 MONROVIA ST, OVERLAND PARK, KS 66215  
 PRESCRIBER DEA: FT1111119  
 PHARMACY IDENTIFIER: DEA: AB1111119

TEST PATIENT 1/1/00  
 PHONE: SSN: DLN: 1234  
 555 FAKE DR, PHOENIX, AZ 85001  
 PRESCRIBER DEA: BR5511111

+ Group 2073

+ Group 2071

↶ Undo Changes

✖ Reject...

👤 Save Groups

#### 4.2.3 Multiple Patient (with Delayed Patient Picklist)

If you have the Delayed Patient Picklist feature turned on, you must resolve multiple patient requests in order for your users to be able to obtain search results.

To resolve Multiple Patient requests:

1. Navigate to **Menu > Rx Search > Requests Processing**
2. All pending requests will be displayed. If you want to view only Multiple Patient requests, filter by request type: Multiple Patient; you can also add a patient (or requester name) in the Advanced Options filter if necessary, as well as a request date.
3. Click anywhere within the row for the request you want to act upon.

Advanced Options ▾

### Requests Processing

Select a request to review details about the request.

Patient First Name ▾	Patient Last Name ▾	Requestor ▾	Date Requested ▾	Reason ▾
dave	testpatient	Appriss Supervisor	01/12/2018 8:29 PM	Multiple Patient
dave	testpatient	Appriss Supervisor	01/12/2018 7:48 PM	Multiple Patient
dave	testpatient	Tyler Barnett	01/10/2018 8:16 PM	Multiple Patient
dave	testpatient	Appriss Supervisor	01/10/2018 8:15 PM	Multiple Patient
dave	Testpatient	Yetta Norres	01/10/2018 8:13 PM	Multiple Patient
dave	testpatient	Appriss Doctor	01/10/2018 8:13 PM	Multiple Patient

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Next ›
Last »

dave testpatient

DOB: 01/01/1900  
Location:  
PMPi states:  
Reason: Multiple Patient  
Case info: [view](#)  
Prescription Fill Dates: January 12, 2016 until January 12, 2018

- Click "Select Patient for Report"
- Select the patients from the picklist you wish to display for the requester's report

### Select Patients for Report


☐ Patient 2059

Name	DOB	Gender	Address
DAVE TESTPATIENT	1900-01-01		, ,

☐ Patient 2058

Name	DOB	Gender	Address
DAVE TESTPATIENT	1900-01-01		, ,
Dave testpatient	1900-01-01	male	123 test , testing, AL 12345

- Click "Run Report." This will return the selected results to the requester. You will be returned to the Requests Processing screen with a Successful message.


**Success**  
 Patients selected successfully.
 DISMISS

Advanced Options ▾
 
Search

## Requests Processing

Select a request to review details about the request.

Patient First Name ▾	Patient Last Name ▾	Requestor ▾	Date Requested ▾	Reason ▾
dave	testpatient	Appriss Supervisor	01/12/2018 8:29 PM	Multiple Patient
dave	testpatient	Appriss Supervisor	01/12/2018 7:48 PM	Multiple Patient
dave	testpatient	Tyler Barnett	01/10/2018 8:16 PM	Multiple Patient
dave	testpatient	Appriss Supervisor	01/10/2018 8:15 PM	Multiple Patient
dave	Testpatient	Yetta Norres	01/10/2018 8:13 PM	Multiple Patient
dave	testpatient	Appriss Doctor	01/10/2018 8:13 PM	Multiple Patient

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...
Next >
Last >>

**dave testpatient**
Reject...
Consolidate Patients for Report

DOB: 01/01/1900  
 Location:  
 PMPi states:  
 Reason: Multiple Patient

7. Make any necessary consolidations to appropriately combine the patient records and prevent a pending user requester in the future by clicking “Consolidate Patients for Report”
8. Expand the patient group and combine as necessary, as outlined above in the [Multiple Patient](#) section and [Consolidation](#) section.

### 4.3 MyRx (History)

State administrators have access to MyRx History, accessible via MyRx, to view any previous MyRx Requests submitted by Users. Note: Administrators have access to MyRx but are not able to run MyRx searches to see prescriptions associated with a prescriber. MyRx will only work if the user account has a DEA number associated with it. To see prescriptions associated with a prescriber, please see the [Prescriber Activity Request](#) section.

To access MyRx History:

1. Navigate to **Menu > Rx Search > MyRx** and click the **MyRx History** tab
2. All previous requests are displayed.
  - a. You can sort the results by any of the available columns.
3. If necessary, filter or search the history by clicking the “Advanced Options” button and entering additional criteria.
4. Click “Search”

Advanced Options ▾

REQUESTOR FIRST NAME Jordan REQUESTOR LAST NAME Doctor Search

Prescriber First Name: Jordan

Prescriber Last Name: Doctor

Requested From: MM/DD/YYYY

Requested To: MM/DD/YYYY

Role:

DEA:

Prescriber First Name	Prescriber Last Name	Role	DEA	Date Requested
Paul	Forst	Admin	AA1594878	07/02/2015 06:30 PM
Paul	Forst	Admin	AA1594878	07/07/2015 08:21 PM
Paul	Forst	Admin	AA1594878	07/08/2015 03:49 PM
Paul	Doctor	Physician (MD)	BR1111111	07/08/2015 03:49 PM

1 2 3 4 5 ... Next » Last »

Advanced Options ▾

REQUESTOR FIRST NAME Jordan REQUESTOR LAST NAME Doctor Search

### MyRx History

Prescriber First Name	Prescriber Last Name	Role	DEA	Date Requested
Jordan	Doctor	Physician (MD, DO)	AD1111119, DA1111119, DA1111119	08/02/2017 01:41 PM
Jordan	Doctor	Physician (MD, DO)	AD1111119	08/02/2017 03:48 PM
Jordan	Doctor	Physician (MD, DO)	AD1111119, DA1111119, DA1111119	08/28/2017 01:58 PM
Jordan	Doctor	Physician (MD, DO)	AD1111119, DA1111119, DA1111119	08/28/2017 02:11 PM
Jordan	Doctor	Physician (MD, DO)	BN1111119	12/06/2017 07:36 PM
Jordan	Doctor	Physician (MD, DO)	BN1111119, BN1111119	12/28/2017 04:16 PM

## 5 Insight

A select number of reports are available within the AWARxE application. These include reports on prescriber activity, dispenser activity, patient activity, patient search history, and DEA number verification.

### 5.1 New Reports

To run a report:

1. Navigate to **Menu > Insight > New Report**
2. A list of reports and their associated descriptions are displayed.

## PMP AWARe Reports

Report Name	Description
Prescriber Activity Request	Displays a summary of prescriptions prescribed by specified DEA number and the corresponding patient and pharmacy information.
Dispenser Activity Request	Displays a summary of prescriptions dispensed at specified location and the corresponding patient and prescriber information.
Patient History Request	Displays a list of all AWARe users requesting a report on the identified patient.
DEA	Displays current information for prescribers or dispensers as contained within the DEA database.
Investigative Patient Request	Allows broader searches for a single or multiple patients by name, identification number, or address.
Medical Marijuana Card Request	A searchable repository of active medical marijuana card registrations by patient name or card number.

- Click the name of the report you want to run.
- Follow the steps to run the report as outlined below in the individual report sections.
  - Note: Administrator accounts are configured to display all available application settings. The Request Purpose section is not required and is generally used by administrators to configure as required for law enforcement or board users.

Request Purpose

Investigation Type

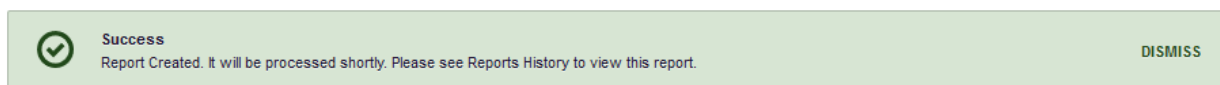
Case Number

Case Comments

Primary Drug Category

Drug Product Name

- Select the desired results from the picklist if applicable (partial search on Prescriber Activity, Dispensary Activity, Investigative Patient Request.)
- A Report Creation message is displayed on screen.



- Access the results by navigating to **Menu > Insight > Reports History**.

### 5.1.1 Prescriber Activity Request

- Navigate to **Menu > Insight > New Reports** and click "Prescriber Activity Request"
- Enter the DEA number or the name of the prescriber. Due the different manner in which prescriber names can be provided by pharmacies, we recommend using a partial search to ensure you obtain all applicable results. Using partial search will result in a picklist for you to select the appropriate prescriber.



## Prescriber\*

DEA Number		OR	First Name <input checked="" type="checkbox"/> Partial Search	Partial search recommended. If you are not getting results, it may require entry of the prescriber's professional suffix with their last name. Example: Jones, MD
			Paul	
			Last Name <input checked="" type="checkbox"/> Partial Search	
			Doc	

3. Enter the date range for the report. If necessary, you can also filter by drug schedule, drug categories, generic drug name, or patient. Then, click "Run Report"

Rx Written Date*	Drug	Patient
From:	Schedule:	First Name
12/11/2016		
To:	Categories	Last Name
12/11/2017	Select to add multiples	
	Generic Name	DOB
		MM/DD/YYYY

4. If partial search was used, you will be presented with a picklist to select the prescriber you were looking for. Select the prescriber and click "Run Prescriber Activity."

### Multiple Prescribers Found

Multiple prescribers found matching your criteria. Please select the prescriber(s) or refine your search.

	First Name	Last Name	DEA Number	Address
<input checked="" type="checkbox"/>	Paul	Doctor	AD1111119	

Refine Search Criteria

Run Prescriber Activity

5. Once you have selected the prescriber or if you did not use partial search, a successful message is displayed on screen. Navigate to **Menu > Insight > Reports History** to view the results of your search.

**Success**

Report Created. It will be processed shortly. Please see Reports History to view this report.

**DISMISS****Report Results**

Advanced Options ▾

REPORT TYPE

any

**Search****Report Requests**

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requestor	Request Date	Status	Flagged for Investigation
Prescriber Activity Request Documents: <a href="#">view</a>	DEA: AD1111119	Paul Doctor	Local Police	12/11/2017 3:05 PM	Ready	

6. Once the report has a status of “Ready,” click the “Prescriber Activity Request” link to view the results of the report.

<div><div></div>Paul Doctor</div>				
Street Address	Street Address 2	City	State	Zip
Report Criteria				
DEA Number	Prescriber First Name	Prescriber Last Name		
AD1111119	Paul	Doctor		
<div><div></div>Summary</div>				
Prescriptions:	4			
Patients:	3			
Pharmacies:	3			

The top of the report itself will have a prescriber table which will detail any names, DEA numbers, and available addresses associated with your prescriber search, as well as a summary of the prescriptions contained within the report to detail prescription, patient and pharmacy count at a quick glance. Above this are excel and PDF buttons for exporting, and if configured for your site, the ability to share the report with another administrator.

Prescriber Activity										
Last	First	DOB	Fill Date	Written Date	Drug Name	Qty	Supply	Store ID	Rx #	Pymt Type
Testpatient	Bob	01/01/1900	08/07/2017	08/07/2017	ALPRAZOLAM 2 MG TABLET	10.0	10	WALG7516	xx091	Comm Ins
patient	test	01/01/1901	04/11/2017	04/11/2017	GABAPENTIN 100 MG CAPSULE	30.0	30	Appr1119	1234567	Comm Ins
TESTPATIENT	ALICE	01/01/1900	12/19/2016	12/19/2016	ACETAMINOPHEN-COD #3 TABLET	3.0	3	Appr1119	AT1152500	Private Pay
TESTPATIENT	BOB	01/01/1900	12/15/2016	12/15/2016	HYDROCODON-ACETAMINOPHN 10-325	30.0	10	Dave1119	152847B	Comm Ins
Dispensers										
Store ID	Name	Address		City	State	Zip				
Appr1119	Appriss Pharmacy	10401 LINN STATION RD		LOUISVILLE	KY	40223				
Appr1119	Appriss Pharmacy	10401 LINN STATION RD		LOUISVILLE	KY	40223				
WALG7516	WALGREEN CO.	301 W MAIN ST		INDEPENDENCE	KS	67301				

The Prescriber Activity table will provide the prescription detail. You can sort it by any of its columns.

The Dispensers table will provide the dispensary name and address for any pharmacies that filled the prescriptions in the Prescriber Activity table.

Therapeutic Class Summary			
Therapeutic Class 4	Script Count	Patient Count	Pharmacy Count
BENZODIAZEPINES (ANXIOLYTIC, SEDATIV/HYP)	1	1	1
OPIATE AGONISTS	2	2	1
ANTICONVULSANTS, MISCELLANEOUS	1	1	1

A Therapeutic Class Summary table is provided as well for quick reference.

See the [Reports History](#) section for more information.

### 5.1.2 Dispensary Activity Request

1. Navigate to **Menu > Insight > New Reports** and click “Dispensary Activity Request”
2. Enter the DEA, NCPDP, or Pharmacy Name you’d like to search.

#### Request Criteria

##### Dispenser\*

DEA Number

OR

Name

☒

Partial Search

Dillon

NCPDP

3. Enter the date range for your search. You can also filter by drug schedule, category, generic drug name, or patient if necessary.

##### Rx Fill Date\*

From

12/29/2016

To

12/29/2017

##### Drug

Schedule

Categories

Select to add multiples

Generic Name

##### Patient

First Name

Last Name

DOB

MM/DD/YYYY

- Click "Run Dispensary Activity Report." If partial name search was used, pick the dispensary from the pick list and click "Run Dispensary Activity."

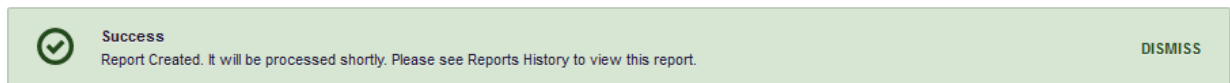
### Multiple Dispensaries Found

Multiple dispensaries found matching your criteria. Please select the dispensary or refine your search.

	Name	DEA Number	Address	
<input type="checkbox"/>	DILLON PHARMACY #36	AD1631983	1320 N MAIN ST	
<input type="checkbox"/>	DILLON PHARMACY #33	AD9221033	108 FISHEL ST	
<input type="checkbox"/>	DILLON PHARMACY	BD2125335	1108 E 1ST ST	
<input type="checkbox"/>	DILLON PHARMACY, #74	BD2241711	122 N BROADWAY	
<input checked="" type="checkbox"/>	DILLON PHARMACY, #72	BD2447135	10515 W CENTRAL AVE	
<input type="checkbox"/>	DILLON'S, PHARMACY #19	BD6514865	4701 W 6TH ST	

[Refine Search Criteria](#)[Run Dispensary Activity](#)

- A successful message is displayed on screen. Navigate to **Menu > Insight > Reports History** to view the results of your search.



## Report Results

Report Requests					
Click on Report Type to view the report					
Report Type	Key Parameters	Match Result	Requestor	Request Date	Status
<a href="#">Dispensary Activity Request</a>	DEA: BD2447135	DILLON PHARMACY	Jordan Crawford	12/21/2017 6:16 AM	Ready

- Once the report has a status of "Ready," click the "Prescriber Activity Request" link to view the results of the report.

Report Prepared: 12/21/2017  
Date Range: 12/21/2016 – 12/21/2017

Download PDF Download CSV Share Report

DILLON PHARMACY				
Street Address	City	State	Zip	
10515 W CENTRAL AVE	WICHITA	KS	67212	
Report Criteria				
Street Address	City	State	Zip	DEA Number
10515 W CENTRAL AVE	WICHITA	KS	67212	BD2447135
Summary				
Prescriptions:	8			
Patients:	5			
Prescribers:	4			

The top of the report itself will have a dispenser table which will detail the dispensary name, DEA number, and address associated with your dispensary search, as well as a summary of the prescriptions contained within the report to detail prescription, patient and prescriber count at a quick glance. Above this are excel and PDF buttons for exporting, and if configured for your site, the ability to share the report with another administrator.

Dispenser Activity										
Last	First	DOB	Fill Date	Drug Name	Qty	Supply	Written Date	Prescriber Name	Rx #	P
Carroll	Lucinda	10/31/1990	08/15/2017	CHEST CONGESTION RELIEF PE	801.0	214	08/01/2017	LLC GENOA HEALTHCARE OF KANSAS	fgT3DNEEkap4VlxB3QcG	M
Marquardt	Joshuah	05/19/2017	08/15/2017	TELMISARTAN 40 MG TABLET	658.0	740	07/26/2017	WALGREEN CO	K	C
Zulauf	Antone	03/31/2010	08/15/2017	MAPAP ARTHRITIS ER 650 MG CPLT	336.0	171	07/31/2017	STANFORD W GRIST, DVM	5	V C
Pollich	Rodrick	01/27/1985	08/15/2017	VENLAFAXINE HCL ER 75 MG CAP	954.0	45	07/27/2017	CRANFORDS DRUG STORE INC	xhLTHuZ	V C
Doyle	Diego	09/16/1977	08/15/2017	VALSARTAN-HCTZ 320-25 MG TAB	534.0	331	07/31/2017	WOOLMARKET PHARMACY INC	1kX3vzfQu3OHJcCCPg42Ls3o	C Ir
Zulauf	Antone	03/31/2010	08/15/2017	AMOXICILLIN 250 MG/5 ML SUSP	160.0	388	07/29/2017	ERIC M WOLFSON	Af4vKfFnnrWDZGA12CQ	M
Homenick	Jonatan	07/09/1961	08/15/2017	ENALAPRIL MALEATE 20 MG TAB	19.0	425	07/31/2017	DAVIS PHARMACY	6JeeW2V	V C
Kirlin	Luigi	10/13/1937	08/15/2017	HUMATROPE 12 MG	330.0	179	07/25/2017	ACCREDITO HEALTH GROUP	B2OKI0YIFFSHL1YHBIs	C

The Dispenser Activity table will provide the prescription detail. You can sort it by any of its columns.

The Prescribers table will provide the prescriber name, and address if available, for any prescribers that wrote the prescriptions in the Dispenser Activity table.

Therapeutic Class Summary			
SKELETAL MUSCLE RELAXANTS, MISCELLANEOUS	1	1	1
HIV NUCLEOSIDE, NUCLEOTIDE RT INHIBITORS	2	2	2
REPLACEMENT PREPARATIONS	2	2	2
BETA-ADRENERGIC BLOCKING AGENTS	12	10	12

A Therapeutic Class Summary table is provided as well for quick reference.

See the [Reports History](#) section for more information.

### 5.1.3 Patient History Request

The Patient History Request will enable the administrator to view all users who queried a particular patient.

1. Navigate to **Menu > Insight > New Reports** and click “Patient History Request”
2. Enter the patient’s first name, last name, birthdate, and your search date range, and click “Run Patient History Request.”

#### Patient History Request [Back to New Reports](#)

Patient First Name:

Patient Last Name:

Patient DOB:

From:

To:

☐ Run on behalf of...

Run Patient History Request

3. A successful message is displayed on screen. Navigate to **Menu > Insight > Reports History** to view the results of your search.



Success

Report Created. It will be processed shortly. Please see Reports History to view this report.

DISMISS

## Report Results

### Report Requests

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requestor	Request Date	Status
Patient History Request	Patient Name: bob testpatient	19 Requests	Jordan Admin	01/25/2018 11:10 AM	Ready

- Once the report has a status of “Ready,” click the “Patient History Request” link to view the results of the report.

### Patient History Results

Report Prepared: 01/25/2018  
Date Range: 12/15/2017 – 01/15/2018

 Download PDF  Download CSV  Share Report

bob testpatient								
<b>Report Criteria</b>								
DOB 01/01/1900								
<b>Patient History</b>								
Patient Last Name	Patient First Name	Patient DOB	Requestor Last Name	Requestor First Name	User Role	Date	Source	
TESTPATIENT	BOB	01/01/1900			Nurse Practitioner / Clinical Nurse Specialist	12/18/2017 09:17 AM	Gateway	
TESTPATIENT	BOB	01/01/1900			Nurse Practitioner / Clinical Nurse Specialist	12/18/2017 08:42 AM	Gateway	
TESTPATIENT	BOB	01/01/1900	Crawford	Jordan	Nurse Practitioner / Clinical Nurse Specialist	12/20/2017 03:54 PM		
TESTPATIENT	BOB	01/01/1900	Doctor	Paul	Physician (MD, DO)	01/11/2018 07:10 AM		
TESTPATIENT	BOB	01/01/1900	Doctor	Paul	Physician (MD, DO)	01/11/2018 07:10 AM		
TESTPATIENT	BOB	01/01/1900	Kelly	R	Physician (MD, DO)	12/19/2017 04:33 AM		
TESTPATIENT	BOBBY	01/01/1900	Doctor	Paul	Physician (MD, DO)	01/11/2018 07:10 AM		

The report will display a list of users who have queried the patient, including their role and the date and time of the search. You can filter by any of the columns and can export the report to PDF or CSV format.

#### 5.1.4 DEA (Search)

DEA Search is a quick reference to provide you with additional information on a DEA number. DEA Search can tell you whether a DEA number is valid or invalid, and if found in our registry, can provide you with the data from the registry.

To run a **DEA search**, navigate to **Menu > Insight > New Reports**, click the “DEA” link. Enter the DEA number you wish to search for, and click the magnifying glass.

## DEA Search [Back to New Reports](#)



### Activity

Active

### Additional company info

null

### Address line1

636 2ND ST NE

### Address line2

SUITE B

### Business activity code

14

### City

ALABASTER

### Clean address one

636 2ND ST NE

### Clean address two

null

### Clean apartment suite unit number

null

## 5.1.5 Investigative Patient Request

The Investigative Patient Request provides broader search capabilities as it allow you to search for a single patient or multiple patients by name, identification number, or address.

1. To run an investigative Patient Request, navigate to **Menu > Insight > New Reports** and click "Investigative Patient Request."



#### Request Criteria

##### Patient\*

First Name <input type="checkbox"/> Partial Search	Identification Number <input type="checkbox"/> Partial Search	Address: <i>Requires either City/State or Zip</i>	
<input type="text" value="bob"/>	<input type="text"/>	<input type="text" value="i.e 4300 N Broadway"/>	
Last Name <input type="checkbox"/> Partial Search	Phone Number	City	State
<input type="text" value="testpatient"/>	<input type="text" value="(000) 000-0000"/>	<input type="text"/>	<input type="text" value="v"/>
Date of Birth	Zip Code		
<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>		

##### Rx Date\*

Date Type: ☒ Written Date ☐ Fill Date

From

To

##### Drug

Schedule

2. Enter your patient criteria.

The minimum patient requirements are one of the following:

FN + LN

ID Number

Phone Number

Address + Zip Code

Address + City + State

3. Date Range is always required, and users can select from either written date or fill date. Users can filter by drug schedule if needed.
4. Click "Search." A successful message is displayed on screen. Navigate to **Menu > Insight > Reports History** to view the results of your search.



##### Success

Report Created. It will be processed shortly. Please see Reports History to view this report.

DISMISS

## Report Results

### Report Requests

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requestor	Request Date	Status
<a href="#">Investigative Search Request</a>	First Name: bob, Last Name: testpatient	1 Patients	Jordan Crawford	12/18/2017 7:29 AM	Ready

- Once the report has a status of “Ready,” click the “Investigative Search Request” link to view the results of the report.
- This will take you to a picklist to select from all patients that matched that search. Select your patient(s) and click “Run Report.”

### Investigative Patient Results

[Refine Search](#)

1 matches found

☐ Select All

Select patient(s) to include in the report

☒ **Bob Testpatient**      Date of Birth: 1900-01-01    Gender: unknown      1023 NOT REAL STREET WICHITA KS 67203

**Run Report**

- The report begins with the patients table which will provide you with all the linked records the system was able to locate for the patient(s) you selected. Above the report you are able to export the results or share the report if configured. Below the patients table is a quick reference summary table of various counts.

Report Prepared: 12/18/2017

Date Range: 12/18/2016 – 12/18/2017



Download PDF



Download CSV



Share Report

Bob Testpatient

DOB: 01/01/1900

Gender: unknown

Patient Address One: 1023 NOT REAL STREET

Linked Records

Name	DOB	ID	Gender	Address
Bob Testpatient	01/01/1900	1	unknown	1023 NOT REAL STREET WICHITA KS 67203
BOB TESTPATIENT	01/01/1900	2	male	1023 NOT REAL ST WICHITA KS 67203

Report Criteria

First Name	Last Name
bob	testpatient

Summary

Prescriptions:	4
Prescribers:	3
Pharmacies:	4
Private Pay:	3
Active Daily MME:	0.0

- The prescriptions table will display all pertinent information relating to the prescription, and can be sorted by any of its columns.

Prescriptions

Filled	ID	Written	Drug	QTY	Days	Prescriber	Rx #	Pharmacy	Refills	MME/D	Pymt Type
08/07/2017	1	08/07/2017	ALPRAZOLAM 2 MG TABLET	10.0	10	Paul Doctor	xx091	WALGREEN CO.	0		insurance
01/03/2017	2	01/03/2017	ACETAMINOPHEN-COD #3 TABLET	3.0	3	MULVANE PHARMACY	AT1152500	HEMOCARE PLUS INC	0	4.5	paid
12/27/2016	2	12/27/2016	ACETAMINOPHEN-COD #3 TABLET	3.0	3	WALGREEN CO. CO.	AT1152500	RANDALL, DANIEL C DVM	0	4.5	paid
12/20/2016	2	12/20/2016	ACETAMINOPHEN-COD #3 TABLET	3.0	3	WALGREEN CO. CO.	AT1152500	Appriss Pharmacy	0	4.5	paid

Per CDC guidance, the conversion factors and associated daily morphine milligram equivalents for drugs prescribed as part of medication-assisted treatment for opioid use disorder should not be used to benchmark against dosage thresholds meant for opioids prescribed for pain.

Prescribers

Name	Address	City	State	Zip	Phone
WALGREEN CO. CO.	301 W MAIN ST	INDEPENDENCE	KS	67301	
Paul Doctor					
MULVANE PHARMACY	1008 SE LOUIS DR	MULVANE	KS	67110	

Dispensers

Pharmacy	Address	City	State	Zip	Phone
Appriss Pharmacy	10401 LINN STATION RD	LOUISVILLE	KY	40223	5028151000
HEMOCARE PLUS INC	864 WILSON DR	RIDGELAND	MS	39157	
RANDALL, DANIEL C DVM	20 RAYFORD LN	GREENVILLE	SC	29609	
WALGREEN CO.	301 W MAIN ST	INDEPENDENCE	KS	67301	

9. A prescriber and dispensers table is listed below to relate the prescriptions in the prescriptions table to their associated prescribers and dispensers.

Therapeutic Class Summary					
Therapeutic Class 4	Script Count	Dispensary Count	Prescriber Count	Total Quantity	Total Days Supply
BENZODIAZEPINES (ANXIOLYTIC, SEDATIV/HYP)	1	1	1	10.0	10
OPIATE AGONISTS	3	3	2	9.0	9

10. A Therapeutic Class Summary table is provided as well for quick reference.

See the [Reports History](#) section for more information.

## 5.2 Reports History

Reports History is where all reports are stored. Users must navigate here to access any report that they have run.

To access Reports History, navigate to **Menu > Insight > Reports History**.

Reports have 4 status types: In Progress, Ready, In Review, and Rejected. In Review reports need to be approved or rejected in [Reports Processing](#). Rejected Requests retain the rejection reason. To see the rejection reason, hover over the "Rejected" message in red. To view the results of the report, click on the Report Name in the Report Type column.

## Report Requests

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requestor	Request Date	Status
Prescriber Activity Request		No Match	Andrew Kulinski	12/04/2017 8:16 AM	Rejected
Prescriber Activity Request Documents: <a href="#">view</a>	DEA: AD1111119	Paul Doctor	Jon DEA	11/30/2017 5:42 AM	In Review
Prescriber Activity Request Documents: <a href="#">view</a>	DEA: AD1111119	Paul Doctor	Jonathan Porter	11/30/2017 5:38 AM	Ready
Investigative Search Request	First Name: John, Last Name: DOe, Birthdate: 1900-01-01	No Match	DELEGATE CLEPDDI	11/28/2017 12:58 PM	Ready
Prescriber Activity Request	DEA: BK8020137	No Match	DELEGATE CLEPDDI	11/28/2017 12:50 PM	Ready
Prescriber Activity Request	DEA: AD1111119	Paul Doctor	DELEGATE CLEPDDI	11/28/2017 12:39 PM	Ready

If available, case numbers, comments, or documentation uploads can be viewed or downloaded by clicking the “View” button. To close, click “View” again.

Reports History can be filtered by the following:

Advanced Options ▾

REPORT TYPE any

Search

Report Type:

☐ Dispenser Activity
 ☐ Prescriber Activity
 ☐ Investigative Search
 ☒ Any

Requestor First Name:

Requestor Last Name:

DEA:

NCPDP:

Request Date:

Search for:

☐ Shared Report

Request Date	Status	Flagged for Investigation
4/2017 9:39	Ready	
4/2017 9:38	Ready	
4/2017 9:30	Ready	
4/2017 9:27	Ready	
4/2017 8:16	Rejected	

## 5.3 Reports Processing

In the event you have configured your site to allow for users to utilize Insight Reports (ex. Law enforcement users or board users) and you have set those to require administrative approval, Reports Processing is where reports that are pending approval will go for approval.

To approve or reject a report:

1. Navigate to **Menu > Insight > Reports Processing**
2. Click anywhere within the row of the report request you want to review to see further details about the request. You can also click on the requester name to view more details on the requester's account.

Advanced Options ▾

REPORT TYPE any

Search

### Reports Processing

Select a report to review details about the report.

Match Result	Report Type	Requestor	Date Requested	Reason
Paul Doctor	Prescriber Activity Request	Local Police	12/11/2017 10:05 AM	requires_approval
Paul Doctor	Prescriber Activity Request	Local Police	12/11/2017 9:55 AM	requires_approval
Paul Doctor	Prescriber Activity Request	Jon DEA	11/30/2017 5:42 AM	requires_approval
Paul Doctor	Prescriber Activity Request	Jon DEA	11/14/2017 6:48 AM	requires_approval
Paul Doctor	Prescriber Activity Request	Jon DEA	11/14/2017 6:44 AM	requires_approval
Appriss Doctor	Prescriber Activity Request	Jon Tester	04/27/2017 7:20 AM	requires_approval

Paul Doctor

Reject... Approve

**Key Parameters:** DEA: AD1111119  
**Report Type:** Prescriber Activity Request  
**Reason:** requires\_approval  
**Case info:** [view](#)  
**Case Number:** 43234

3. If you have required case numbers, comments, or documentation upload, they can be viewed or downloaded by clicking the “View” button. To close, click “View” again. Case comments are also visible by clicking the view link, and are also visible by clicking on the case number.
4. Once you have reviewed the request, click the Reject or Approve button to act upon the request. If rejecting, you must supply a rejection reason which is supplied to the user and retained within the Reports History screen.

## 6 Admin

Most admin functions are housed under the Admin section of the application. Within this section of the application, you can create/manage patient alerts, manage pharmacy compliance, and manage user accounts.

### 6.1 Unsolicited Reports

**Note:** If your state has Clinical Alerts, disregard this section and navigate to the Clinical Alerts Section.

Unsolicited Reports are reports run by State Administrators that generate a list of patients that have met or exceeded a given threshold of prescribers, dispensers, and dispensations in a given date range. After the report is generated, patients meeting or exceeding these thresholds can be selected to generate an alert, or in the absence of a PMP AWA<sub>RxE</sub> account associated with the DEA number(s) for the prescription, a letter.

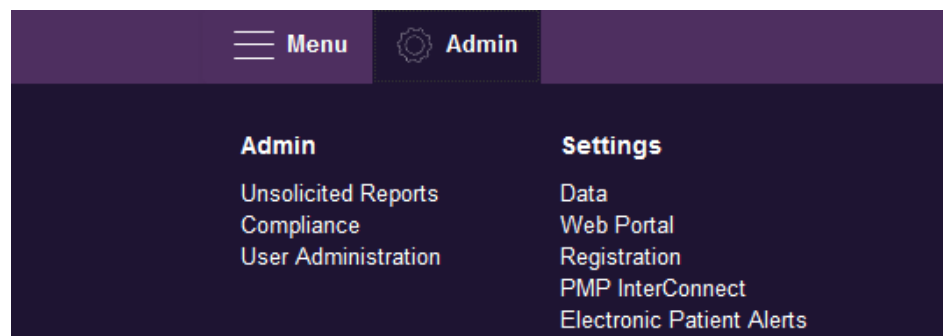
These are manual reports, so in order to send alerts a report must be run each time. There are multiple options for how alerts will be sent – Letters can be generated for all alerts, or only for those which are not linked to PMP AWA<sub>RxE</sub> accounts, or letters can be generated for all alerts, and emails/electronic alerts can be sent for those that can be linked to an account.

Regardless of the delivery method selected, any user who receives an electronic alert will have access to a generated letter via PMP AWA<sub>RxE</sub>.

Letters are generated in batches, and a mailing list is provided for creating mailing labels.

#### 6.1.1 Building the Letter Template

To access the letter template, navigate to **Admin > Settings > Electronic Patient Alerts**.



## PDF Mailing Template

### Letterhead



Browse... No file selected.

### Body

Recipient Name Recipient Address Recipient City Recipient State  
Recipient Zip Code Patient Name Patient Date of Birth Report Creation Date  
Patient Initials

@recipient.name  
@recipient.address  
@recipient.city, @recipient.state @recipient.zipcode

RE: @patient.name (@patient.date\_of\_birth)  
@report.alert\_type  
@report.date\_created

The state has identified the listed patient as exceeding certain prescriber, pharmacy and prescription thresholds as determined by the Board of Pharmacy. During your next interaction with the patient, we highly suggest you review the patient's prescriptions history and determine if other alternative treatments are available. The Board of Pharmacy is not implicating any wrongdoing by the listed individual but only that the patient's history suggests that any treatments may require further examination.

1. Upload a letterhead by clicking "Browse" and selecting your letterhead. The letterhead is formatted as a header that spans the full body of the document.
2. Enter the body of your letter in the "Body" section. Use the buttons in blue to tailor your letter to recipient and patient information.
3. Upload a signature if necessary. Signatures are formatted to appear as handwritten signatures.

## Email

### Legal Disclaimer

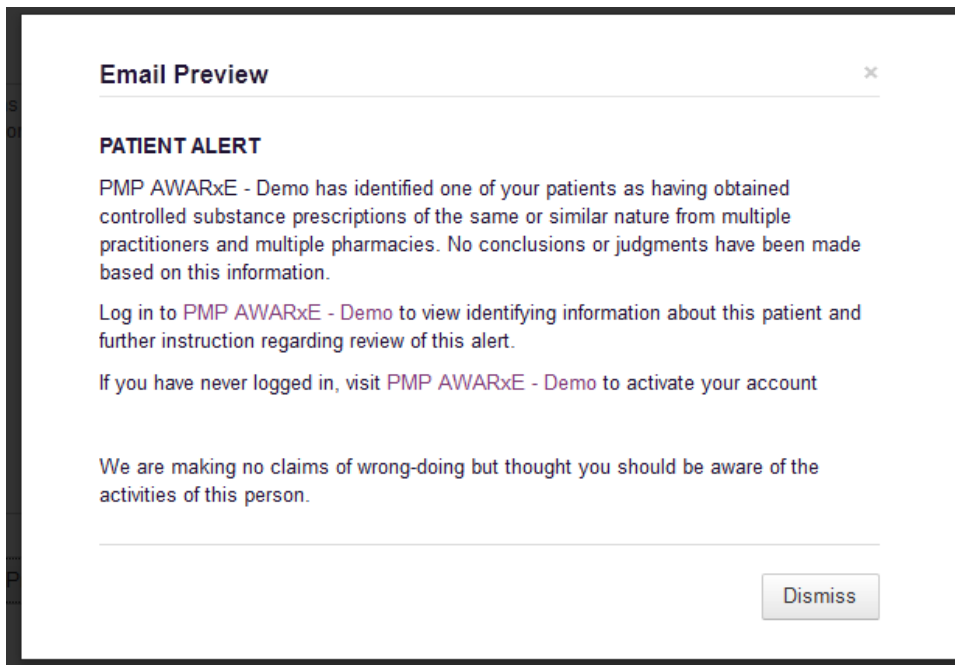
We are making no claims of wrong-doing but thought you should be aware of the activities of this person.

Save Changes

✉ Preview Email...

✉ Preview Letter...

4. Enter a disclaimer for the email that is sent if necessary.
5. Preview the letter by clicking the “Preview Letter” button. This will provide you with a PDF of the letter template. Email preview is available as well by clicking the “Preview Email” button. The contents of the email cannot be changed aside from the disclaimer. No patient information is provided in the email.







@recipient.name  
@recipient.address  
@recipient.city, @recipient.state @recipient.zipcode

RE: @patient.name (@patient.date\_of\_birth)  
@report.alert\_type  
@report.date\_created

The state has identified the listed patient as exceeding certain prescriber, pharmacy and prescription thresholds as determined by the Board of Pharmacy. During your next interaction with the patient, we highly suggest you review the patient's prescriptions history and determine if other alternative treatments are available. The Board of Pharmacy is not implicating any wrongdoing by the listed individual but only that the patient's history suggests that any treatments may require further examination.

Sincerely,

A handwritten signature in black ink that reads "MICKEY MOUSE". The signature is stylized with a large, sweeping underline.


6. Once you are satisfied with the format of the letter and the email disclaimer, click "Save Changes." You are then ready to start generating the report and subsequent notifications. If you have not completed the above steps, you will receive an error when attempting to run the report.

#### 6.1.2 Generating the Report

To generate the Unsolicited Report, navigate to **Admin > Admin > Unsolicited Reports**.

Menu Admin Support menu Jordan Crawford

Admin > Unsolicited Reports > Threshold

PMP AWARE - Demo  
Powered by   
Support: 1-866-4

Threshold

Advanced Options ▾

END DATE 12/31/2017 NOTIFICATION 08/01/2017 PRESCRIBER COUNT 3 DISPENSER COUNT 3 Search

Prescriber Count: 3

Dispenser Count: 3

Dispensation Count: 3

Threshold Begin Date: 12/01/2017

End Date: 12/31/2017

Threshold Notification: 08/01/2017

PMP AWAREx - D

1. Click the “Advanced Options” button to enter your criteria for your report.
2. Enter your minimum prescriber count, ex. 3
3. Enter your minimum dispenser count, ex. 3
4. Enter your minimum dispensation count, ex. 3
5. Enter a Threshold Begin Date and End Date (date range for the report, Ex. 12/01/2017-12/31/2017)
6. Enter a Threshold Notification Date:
  - a. This can be set to the same date as the threshold begin date if you only want to alert prescribers and dispensers that prescribed or dispensed a prescription to the patient during the threshold date range.

**OR**

  - b. This can be set as an earlier date than the threshold begin date to alert prescribers and dispensers that have written a prescription for the patient recently but may not have written a prescription for the patient within your given threshold date range. For example, if the threshold notification date is 08/01/2017, and the threshold date range (begin date and end date) are 12/01/2017 to 12/31/2017, the system will look only for patients with  $\geq$  x# prescribers,  $\geq$  x# dispensers, and  $\geq$  x# prescriptions between 12/01/2017 to 12/31/2017, but will notify any prescribers or dispensers who wrote or dispensed a prescription to that patient from 08/01/2017 through 12/31/2017.
7. Once you have entered your desired values, click search.

Menu Admin

Support Menu

Jordan Crawford ▾

Admin > Unsolicited Reports > Threshold

PMP AWARE - Demo  
Powered by Awarxē™  
Support: 1-866-Appriss

Threshold



**Success**  
Threshold Report Request has been queued.

DISMISS

You will receive a successful message notifying you that the request has been queued.

The report will be available shortly in Reports History (**Menu > Insight > Reports History**). The report will be displayed as report type “Threshold Request” and will have a status of “In Progress” or “Ready.”

Menu Admin

Support Menu

Jordan Crawford ▾

Insight > Reports History

PMP AWARE - Demo  
Powered by Awarxē™  
Support: 1-866-Appriss

Advanced Options ▾

REPORT TYPE any

Search

### Report Requests

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requestor	Request Date	Status	Flagged for Investigation
<a href="#">Threshold Request</a>	Prescriber Count: 3, Dispenser Count: 3, Prescription Count: 3	0 Patients	Jordan Crawford	01/18/2018 3:35 PM	In_progress	
<a href="#">Threshold Request</a>	Prescriber Count: 1, Dispenser Count: 1, Prescription Count: 1	1994 Patients	Jordan Crawford	01/18/2018 3:33 PM	Ready	

### 6.1.3 Sending Alerts

To begin sending Patient Alerts, access your completed Threshold Request in Reports History (**Menu > Insight > Reports History**) by clicking the “Threshold Request” hyperlink the “Report Type” column.

Criteria

Prescribers: 3, Dispensers: 3, Prescriptions: 3, Date Range: 08/01/2017–01/18/2018 Pre-Threshold Notification: 08/01/2017

Patient Alert Batches

<input type="checkbox"/>	Patient Full Name	DOB	Prescribers	Dispensers	Dispensations	MME/D	Batched	Batch Name
<input type="checkbox"/>	Alex Lori Doe	01/01/1900	9	2	9	0.0		
<input type="checkbox"/>	Harold Willie Mitchell	08/22/1978	15	3	29	13.552		
<input type="checkbox"/>	John Lisa Doe	05/18/2011	5	6	6	0.947		
<input type="checkbox"/>	Steve Lisa Harris	05/18/2011	5	5	9	20.989		

Generate Patient Alert Batch for selected Patients

Delivery Method

- ☒ Automatically send email alerts; create letter only if no email is on file  
☐ Automatically send email alerts; create letters for all  
☐ Do not send email alerts; create letters for all

Batch Name

Generate

This will display the Threshold Results screen. Expand the “Criteria” section and the “Patient Alert Batches” section for more information.

- Select the patients you wish to send alerts on. You do not have to send all alerts at once, you can select a subset of patients, generate those, and revisit the Threshold Request at any time to generate more alerts on any unchecked patients.

<input type="checkbox"/>	Patient Full Name	DOB	Prescribers	Dispensers	Dispensations	MME/D	Batched	Batch Name
<input type="checkbox"/>	Alex Lori Doe	01/01/1900	9	2	9	0.0		
<input checked="" type="checkbox"/>	Harold Willie Mitchell	08/22/1978	15	3	29	13.552		
<input checked="" type="checkbox"/>	John Lisa Doe	05/18/2011	5	6	6	0.947		
<input checked="" type="checkbox"/>	Steve Lisa Harris	05/18/2011	5	5	9	20.989		

You can view the patient report itself to help you in your determination by clicking on the patient’s name. This will display the patient’s history in the Prescriptions table, as well as any other Unsolicited Reports this patient has appeared on in the “Unsolicited Reports” section.

Back

Report Prepared: 01/18/2018

Date Range: 08/01/2017-01/18/2018

Download PDF
Download CSV

+ Alex Doe

- Unsolicited Reports

File Name	Date
No Repeat Interval Test 2	12/28/2017

- Prescriptions

Filled	ID	Written	Drug	QTY	Days	Prescriber	Rx #	Pharmacy	Refills	MME/D	Pymt Type
11/05/2017	1	12/18/2008	PAROXETINE ER 12.5 MG TABLET	65.9	880	L.L.C., SOUTH CAROLINA CVS PHARMACY, L.L.C.	WQASq6ZXzsBc4Kz	WALGREEN CO.	0	-	indian_nation
11/04/2017	1	03/07/2009	SOMA 250 MG TABLET	4.22	437	10MP, PALMETTO	G3ftaPt7ApjKTCj	WALGREEN CO.	0	-	paid
11/04/2017	2	05/31/2003	PLO GEL MEDIFLO PRE-MIXED	47.0	166	SOUTHEAST, LEWIS	O3GlmApMeTcsMaH	MISSISSIPPI CVS PHARMACY, L.L.C.	0	-	medicare
11/03/2017	1	03/05/2011	CLONAZEPAM 0.5 MG TABLET	70.91	764	CORPORATION, K & B MISSISSIPPI CORPORATION	jwTXZi8LaCHGXul	WALGREEN CO.	0	-	indian_nation

- Select your desired delivery method and enter a batch name. The batch name will correspond with the title of the batch of letters available for download and the Mailing Label list available for download. (Please see step 4 for more information.)

## Generate Patient Alert Batch for selected Patients

### Delivery Method

- ☒ Automatically send email alerts; create letter only if no email is on file  
☐ Automatically send email alerts; create letters for all  
☐ Do not send email alerts; create letters for all

### Batch Name

01/18/18 Alerts

Generate

- Click Generate. **Note:** This will begin the process of sending email alerts if you have selected a delivery method that includes emails.

A successful report creation message is displayed.

## Threshold



### Success

Created a report titled '01/18/18 Alerts'. It will be processed shortly.

DISMISS

## Threshold Results

Report Prepared: 01/18/2018 20:54 PM

- Expand the Patient Alert Batches section/Refresh the page and expand the Patient Alert Batches section for more information on the alerts.

## Threshold

## Threshold Results

Report Prepared: 01/18/2018 20:54 PM

### Criteria

Prescribers: 3, Dispensers: 3, Prescriptions: 3, Date Range: 08/01/2017-01/18/2018 Pre-Threshold Notification: 08/01/2017

### Patient Alert Batches

01/18/18 Alerts

Batch Date: 01/18/2018

01/18/18 Alerts.pdf (Pending)

01/18/18 Alerts.csv

Recipient List.csv

**Note:** You can also access Batch exports at any time from Reports History, by clicking anywhere within the row of the report.

## Report Requests

Click on Report Type to view the report

Report Type	Key Parameters	Match Result	Requester
Threshold Request	Prescriber Count: 3, Dispenser Count: 3, Prescription Count: 3	4 Patients	Jordan
Threshold Request	Prescriber Count: 1, Dispenser Count: 1, Prescription Count: 1		Jordan
Threshold Request	Prescriber Count: 1, Dispenser Count: 1, Prescription Count: 1		Jordan
Prescriber Activity Request	DEA: AD1111119		E. P.
Dispensary Activity Request	DEA: FE3680178		te

### Patient Alert Batches x

01/18/18 Alerts

Batch Date: 01/18/2018

01/18/18 Alerts.pdf

01/18/18 Alerts.csv

Recipient List.csv

- a. [Batch Name].pdf is a PDF containing all letters generated by the alerts. They are all in one batch for mass printing. (Pending) means the letters are still being generated. Once that is complete you will be able to click the [Batch Name].pdf link to download the letters.
- b. [Batch Name].csv is a list of patients, recipients, and the associated recipient mailing address for use in creating mailing labels.
- c. Recipient List.csv a list of all the alerts that were generated in the batch, along with their associated patient, recipient, and delivery method of the alert, and the alert date.

## 6.2 Shopper Alerts

Shopper Alerts are a companion piece to Unsolicited Report alerts. If your state has Clinical Alerts, disregard this section and navigate to the Clinical Alerts Section. If you do not have Clinical Alerts and do not see the Shopper Alerts section and wish to use this function, reach out to your Client Relations Manager.

Shopper Alerts are alerts that display on a Patient Report, meaning anytime a user searches the patient, an alert will display that lets the user know that the patient could be a potential shopper.

**Note:** More custom configuration of Shopper Alerts is available.


- The color as displayed on the report can be changed from red to yellow
- The title can be changed from “Suspected Prescriber/Pharmacy Shopper” to more moderate language
- The language of the alert can be modified


These settings are managed by an Appriss Administrator. To make changes to these settings, please reach out to your Client Relations Manager.

To modify the disclaimer, time period and thresholds for Shopper Alerts:

1. Navigate to **Admin > Settings > Shopper Alerts**
  - a. You can click the “Patient Report Alert” link to view more information on Shopper Alerts
2. Enter your desired threshold (ex. 3 and 3)
3. Select your time period for which to determine whether a patient is a shopper
4. Enter a disclaimer if desired
5. Click “View Sample Alert” to preview how the alert will appear; click “Dismiss” to close

## Alert Preview



 **Suspected Prescriber/Pharmacy Shopper** 01/23/2018

Please note that this person has received controlled substances prescriptions written by @prescriber.count prescribers and had them filled at @dispensary.count pharmacies during the past @months.count months. This equals or exceeds the threshold of @prescriber.threshold.count prescribers and @dispensary.threshold.count pharmacies and while there may be a valid reason for this, it also may be indicative of the practice of prescriber and/or pharmacy shopping.

**PATIENT'S COUNTS**  
Prescribers:  
@prescriber.count  
Pharmacies:  
@dispensary.count  
Time Frame:  
@months.count Months

**ALERT THRESHOLDS**  
Prescribers:  
@prescriber.threshold.count  
Pharmacies:  
@dispensary.threshold.count

Alert Disclaimer Text

6. Toggle alerts to “on” if not turned on already
7. Click “Save Settings”

### Set Shopper Alert Thresholds

Trigger a PMP Patient Report Alert when: \*

Count of Prescribers

Count of Pharmacies

≥  AND ≥

Within a Time Period of: \*

☐ 3 Months ☐ 6 Months ☒ 12 Months

**Alert Disclaimer** Appear on all shopper alerts

[View Sample Alert](#)

Alert Disclaimer Text

Alerts

Save Settings

ON

### 6.3 Clinical Alerts

Clinical Alerts provide automatic electronic patient alerts (alerts delivered directly to a prescriber user’s dashboard, and to the user’s registered email if configured by the administrator) to notify that patient has:

- Exceeded a set prescriber/dispenser threshold
- Exceeded a daily active MME threshold
- Been prescribed Opioids and Benzodiazepines concurrently
- Exceeded a daily active MME threshold for Methadone
- Exceeded a days threshold for Opioid prescriptions



If configured, letters can also be generated for prescribers who do not have accounts with your PMP, and for dispensers.

Any of the above alerts can be turned on or off at any time.

### 6.3.1 Configuration

To configure or update your Clinical Alert settings:

1. Navigate to **Admin > Settings > Clinical Alerts**. All Alert types are displayed.

#### PMP Clinical Alerts

Alert Name	Description	Alert Status	Alert Method
Prescriber & Dispenser Thresholds	Generates an alert when a specified number of Prescribers and Dispensers is met or exceeded within a set time period.	<input type="checkbox"/> OFF	Letter Notification
Daily Active MME Threshold	Generates an alert when the daily active MME (morphine milligram equivalent) is greater than or equal to a specified value.	<input checked="" type="checkbox"/> ON	Patient Alerts, Email Notification, Letter Notification
Opioid & Benzodiazepine Threshold	Generates an alert when Opioids and Benzodiazepines are prescribed within a set time period.	<input checked="" type="checkbox"/> ON	Patient Alerts, Email Notification, Letter Notification
Daily Active Methadone Threshold	Generates an alert when the daily active MME (morphine milligram equivalent) for Methadone is greater than or equal to specified value.	<input checked="" type="checkbox"/> ON	Patient Alerts, Email Notification, Letter Notification
Opioid Consecutive Days Threshold	Generates an alert when Opioids have been received daily for longer than a set time period.	<input checked="" type="checkbox"/> ON	Patient Alerts, Email Notification, Letter Notification

2. Click the hyperlink name of the Alert you wish to modify.
3. Add or modify your threshold(s)
  - a. Ex. Prescriber and Dispenser:  $\geq 3$  Prescribers,  $\geq 3$  Dispensers
  - b. Ex. Daily Active MME:  $\geq 60$
4. For Daily Active MME, Methadone MME, and the Consecutive Opioid threshold, toggle Treatment Drugs to “Exclude” if desired
5. Add or modify your disclaimer if needed
6. Select your alert method(s). You can select Patient Alerts only, Patient Alerts with Emails, Letters only, or all of the above.
  - a. If you do not see the letter option, contact your Client Relations Manager to get the Clinical Alert Letters feature turned on.
  - b. If using the letter option, you will want to ensure you build your letters template before turning on the alerts. See the [Generating Letters](#) section for more information.
7. Enter an alert expiration timeframe if desired
8. Select allowed role types if you wish to modify which roles are able to see the alerts
9. Toggle the alert to on if it is not already
10. Click “Save Changes”
11. All changes will take place with the next nightly round of Clinical Alerts.
12. Click the “Back to Alerts List” link if you wish to modify more alerts.

Prescriber/Dispenser Alert Config
Report History
Select Patients
Template

Set Prescriber and Dispenser Thresholds

Alert Status  
OFF

Trigger a Clinical Alert when:

Count of Prescribers  
≥ 3
AND
Count of Pharmacies  
≥ 3

Exceeds Threshold within  
☒ 30
☐ 60
☐ 90
☐ 180
☐ 365 Days

Alert Expiration

After an alert expires, it will no longer be viewable under Patient Alerts.

☐ 30 Days  
☐ 60 Days  
☐ 90 Days  
☐ 180 Days  
☐ Days  
☒ Never

Alert Disclaimer Appears on all clinical alerts

View Sample Alert

This a test for the alert disclaimer field.

Alert Method

☐ Patient Alerts GENERATES NOTIFICATIONS  
☐ Email Notification GENERATES NOTIFICATIONS  
☒ Letter Notification

### 6.3.2 Generating Letters

#### Adding/Modifying the Letter Template

If you do not yet have letter templates in place, follow the below instructions to build your letter template:

- Navigate to **Admin > Settings > Clinical Alerts**
- Click the hyperlink name of the alert type you want to create the letter template for
- Click the **Template** tab
- Upload a letterhead. The letterhead is formatted as a header that spans the full body of the document.
- Fill in the body of your letter. Make sure to use the Alert Type field if you want your letters to display more information on the alert if your letter is not generic, as well as any other fields you see fit.
- Upload a signature if necessary. Signatures are formatted to appear as handwritten signatures.
- Enter a legal disclaimer for the email alerts. Note: Email alerts cannot be changed aside from their disclaimer, and are completely generic so that no PII is sent via email.
- You can preview your emails and/or letter by clicking the associated Preview button.
- Save the desired changes by clicking "Save Changes."

## PDF Mailing Template

### Letterhead



Browse... No file selected.

### Body

Recipient Name Recipient Address Recipient City Recipient State  
Recipient Zip Code Alert Type Patient Name Patient Date of Birth  
Report Creation Date Patient Initials

@recipient.name  
@recipient.address  
@recipient.city, @recipient.state @recipient.zipcode

RE: @patient.name (@patient.date\_of\_birth)  
@report.alert\_type  
@report.date\_created

The state has identified the listed patient as exceeding certain prescriber, pharmacy and prescription thresholds as determined by the Board of Pharmacy. During your next interaction with the patient, we highly suggest you review the patient's prescriptions history and determine if other alternative treatments are available. The Board of Pharmacy is not implicating any wrongdoing by the listed individual but only that the patient's history suggests that any treatments may require further examination.

### Generating/Accessing Letters

Letters are automatically generated for Daily Active MME, Concurrent Opioid & Benzodiazepine, Daily Active Methadone, and Opioid Consecutive Days alerts. Administrators are provided with a PDF containing all associated letters for the day's alerts and a CSV Recipient List.

To access the letters,

1. Navigate to **Admin > Settings > Clinical Alerts**
2. Select your alert type.
3. Click the **"Generated Letters"** tab.
4. Letters and CSV Recipient Lists for the given day are displayed on screen.

- Click the PDF and CSV icons to download.

## Clinical Alerts [Back to Alerts List](#)

[Alert Config](#)

[Generated Letters](#)

[Template](#)

### Patient Letters

Alert Date	Alert Letter
01/22/2018	 PDF  CSV Recipient List
01/21/2018	 PDF  CSV Recipient List

For Prescriber and Dispenser Threshold alerts, patients must be manually selected for the letters. To generate letters for Prescriber and Dispenser Thresholds:

- Navigate to **Admin > Settings > Clinical Alerts**
- Click the “Prescriber and Dispenser Thresholds” link
- Click the “**Report History**” tab
- Click the “Select Patients” link in the Report column that is associated with the day’s report you wish to generate letters for

## Clinical Alerts [Back to Alerts List](#)

[Prescriber/Dispenser Alert Config](#)

[Report History](#)

[Select Patients](#)

[Template](#)

### + Patient Alert Batches

### Prescriber / Dispensary Alert Requests

Click on the things to view the things

Report	Minimum Prescribers	Minimum Dispensaries	Filled At Begin	Filled At End	Request Date	Status
<a href="#">Select Patients</a>	6	6	2017-01-22	2018-01-22	2018-01-22	complete
<a href="#">Select Patients</a>	6	6	2017-01-21	2018-01-21	2018-01-21	complete

- Select the individual patients you wish to generate letters for
- Enter your batch name (required)
- Click “Generate”

## Clinical Alerts [Back to Alerts List](#)

[Prescriber/Dispenser Alert Config](#) [Report History](#) [Select Patients](#) [Template](#)

### Prescriber Dispensary Results

	Patient Full Name	DOB	Prescribers	Dispensers	Dispensations	MME/D	Batched	Batch Name
<input checked="" type="checkbox"/>	6851 CLINICAL	01/15/1935	9	6	32			
<input checked="" type="checkbox"/>	MMEPATIENT_CA CLINICAL	01/15/1935	7	6	7	755.0	01/05/2018	AnotherTest
<input checked="" type="checkbox"/>	6851_DEA CLINICAL	01/15/1935	6	6	8	765.0		
<input type="checkbox"/>	MME CLINICAL	01/15/1935	7	6	7	765.0		


Generate Patient Alert Batch for selected Patients

Batch Name

AnotherTest

Generate

8. A successful “Report Created” message is displayed on screen.


**Success**  
Created a report titled 'Test Batch'. It will be processed shortly.



DISMISS

9. After processing, the letters and recipient list will be available for download in the Patient Alert Batches section under the Report History tab.

## Clinical Alerts [Back to Alerts List](#)

[Prescriber/Dispenser Alert Config](#) [Report History](#) [Select Patients](#) [Template](#)

 Patient Alert Batches

Patient Alert Batches	Batch Date
AnotherTest	01/05/2018
 <a href="#">AnotherTest.pdf</a>	
 <a href="#">Recipient List.csv</a>	

## 6.4 Compliance

As the PMP Administrator, determining which dispensers are non-compliant with the reporting requirements for controlled substances within your state is generally an important task. The AWA<sub>RxE</sub> Portal has a built-in compliance reports module that is based on your reporting requirements.


### 6.4.1 Add Pharmacies

During the implementation phase of your state PMP, the dispensers that are required to report to your state PMP were preloaded here. Going forward, there will be a need for ongoing additions, deletions or updates. The “Add Pharmacies” screen is where pharmacies or non-pharmacy dispensers can be added so they will be included in compliance reporting. There are two methods for adding pharmacies: mass load via CSV file and individually.

To add pharmacies:

1. Navigate to **Admin > Compliance** and click the **“Add Pharmacies”** tab
2. Enter the pharmacy information:
  - a. Click the “Sample Pharmacy List” CSV icon to download the list format and enter the required information. The format should not be changed from CSV when uploading. For more information, see the Compiling Your Compliance Spreadsheet document.
  - b. Manually enter the pharmacy data to the right. If the DEA or NCPDP exists in our DEA registry, clicking the magnifying glass will populate the pharmacy’s information.
3. Click Upload if you uploaded a spreadsheet, or Add Pharmacy if you manually entered the pharmacy.

### Upload List



Sample Pharmacy List

**Browse...** No file selected.

**Upload CSV Pharmacy List**

### Find Or Create

DEA

NCPDP

Pharmacy Name

Pharmacy License Number

Address

City

State

Select State

#### 6.4.2 Manage Pharmacies

The “Manage Pharmacies” table allows for more granular administration of individual pharmacies/dispensaries. You can edit a pharmacy’s reporting requirements or contact information, add specific notes about a pharmacy, update the pharmacy DEA, NCPDP, or license number, exempt the pharmacy, or delete it. You will want to maintain this table at regular intervals as it directly affects the compliance/delinquency reports. If a pharmacy closes, you will want to remove it so it doesn’t continually add to the delinquent pharmacy statistics for your state. If a dispenser, such as a state run facility, has an exemption to the standard reporting requirements, you will want to adjust that pharmacy’s requirement accordingly.

To search and modify a pharmacy:

1. Navigate to **Admin > Compliance** and click the **“Manage Pharmacies”** tab
2. Click the **“Advanced Options”** button and enter your search criteria

Manage Pharmacies

Add Pharmacies

Delinquent Pharmacies

Pharmacy Analysis

Support: 1-866-

Advanced Options ▾

NAME %test%

Search

DEA Number:

NCPDP:

Pharmacy License #:

Name:

Address:

City:

State: 

Select State ▾

Zip Code:

Phone Number:

Download

Address	City	State	Zip	Phone Number
1308 4TH AVENUE	HUNTINGTON	WV	25701	304525122
8614 NW 107TH TERRACE	KANSAS CITY	MO	64153	888801854
1101 E SPRING	ANTHONY	KS	67003	620842511
2815 WATTERSON TRAIL	LOUISVILLE	KY	40299	877977387

5

...

Next >

Last >>

3. Click Search
4. Matching pharmacies are displayed

Manage Pharmacies

Add Pharmacies

Delinquent Pharmacies

Pharmacy Analysis

Support: 1-800-Appriss

Advanced Options ▾

NAME %test%

Search

Pharmacies

Select a pharmacy to review details about the pharmacy.

Download CSV

DEA	NCPDP	Pharmacy Name	Address	City	State	Zip	Phone Number
AP1594870		Paul's Test Pharmacy	10401 Linn Station Road	Louisville	KY	40223	5028153819
AB9876543		RxSentry Test Pharmacy	1907 S College Street...	Auburn	AL	36832	5022762031

5. The table can be sorted by any of the columns if necessary
6. Click anywhere within the row for the pharmacy to display more information and modify the pharmacy

DEA	NCPDP	Pharmacy Name	Address	City	State	Zip	Phone Number
AP1594870		Paul's Test Pharmacy	10401 Linn Station Road	Louisville	KY	40223	5028153819
AB9876543		RxSentry Test Pharmacy	1907 S College Street...	Auburn	AL	36832	5022762031
MY1111119		TEST PHARMACY					

**Paul's Test Pharmacy**
Save Changes
Delete Pharmacy
Edit Pharmacy

**Reporting Requirements**

☐ Exempt
 ☒ Default Frequency
 ☐ Every  days
 ☐ Daily, except
 ☐ Sun
 ☐ Mon
 ☐ Tue
 ☐ Wed
 ☐ Thu
 ☐ Fri
 ☐ Sat

Notes

Pharmacy License #

**Pharmacist in Charge**

First Name  
 Paul

Last Name  
 Test

Email  
 paulstest@pharmacy.com

7. Here you can add notes to the pharmacy's entry, modify pharmacist contact information, as well as modify the pharmacy's reporting requirements:
  - a. **Exempt:** retains the pharmacy in the listing but does not mark them as delinquent if no submissions are received
  - b. **Default Frequency:** Follows the standard frequency set in **Admin > Settings > Data > Submission Frequency**
  - c. **Every X Days** (ex. 7, 30)
  - d. **Daily Except:** Here you can exclude certain days (ex. weekends)
8. You can edit the pharmacy's DEA or NCPDP, name, and address by clicking the "Edit Pharmacy" button
9. Make the necessary changes and click "Update Pharmacy"



**Edit Paul's Test Pharmacy**

DEA

NCPDP

Pharmacy Name

Pharmacy License Number

Address

City

### 6.4.3 Delinquent Pharmacies

The Delinquent Pharmacies report is accessed from **Admin > Compliance**, then click the **Delinquent Pharmacies** tab.

- This is a static report that is run nightly.
- The information in the report is a reflection of what pharmacies were out of compliance at the time the report was run.
- Although the report is run daily, it represents information for the “day before yesterday,” or two days back. For example, if the current date is the 3<sup>rd</sup>, the report, when run, would use a date of the 2<sup>nd</sup>. The information presented in the report would include all pharmacies that were non-compliant as of the 1<sup>st</sup>. The logic behind this is if your PMP requires controlled substances to be reported within 24 hours of dispensing i.e. daily, a pharmacy that dispensed at 11:59 pm on the 1<sup>st</sup> would have until 11:59 pm on the 2<sup>nd</sup> to report this dispensation and be compliant. Running a report at any time on the 2<sup>nd</sup> for the 1<sup>st</sup> could erroneously report pharmacies as non-compliant, while they are still within the allotted 24-hour window for reporting. To accommodate scenarios such as this and to ensure accuracy, the report displays compliance as two days back from current date.
- The report does not update a dispenser’s compliance status for reports submitted outside the compliance window. For example: If a dispenser doesn’t submit their dispensation records for a 3-day period, then submits a “catchup file” that contains those days’ dispensations, they would still show on the delinquent report(s) for those 3 days assuming the PMP submission requirement is daily.

- The report can be downloaded as a CSV file by clicking the CSV icon, and previous reports can be accessed at any time by selecting a different date beneath “Delinquent Pharmacies Report” and clicking “View Report”
- Clicking the pharmacy name on the report will take you to the associated pharmacy’s Pharmacy Analysis Report

#### Delinquent Pharmacies Report

01/21/2018

View Report

Report Prepared: 01/22/2018



Criteria

Report Criteria

Submission Frequency Requirement

daily

Delinquent Pharmacies Found

2632

Reported For

01/21/2018

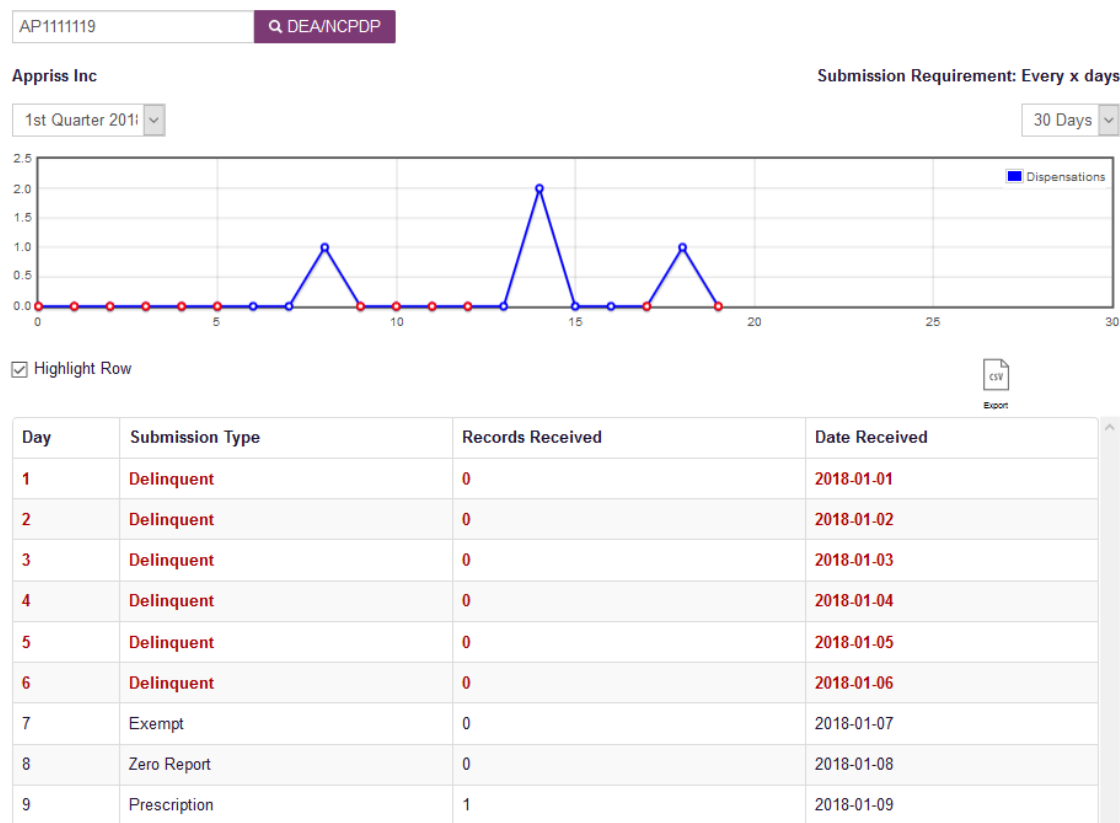
Pharmacies

DEA	NCPDP	Pharmacy Name	Pharmacy Address	Last	Days	Data Submitter	Primary User	Primary Email	Primary Ph
ZZ1234567	1234567	A PHARMACY	1111 FAKE ST WICHITA KS 67202	2017-11-22	60	Appriss	Paul Delegate	paulforst+Apharmacy@gmail.com	502815389
ZD0000000		D PHARMACY CHAIN	7th TEST ST WICHITA KS 67212	2017-11-22	60	Appriss	Paul Forst	paulforst@gmail.com	502815389
ZC2222222		C PHARMACY CHAIN	2nd NOWHERE ST WICHITA KS 67206	2017-11-22	60	Appriss	Paul Forst	pforst@appriss.com	502815389
ZB1111111		B PHARMACY	1234 NOT- A-REAL-PLACE DR WICHITA KS 67202	2015-12-15	768	B PHARMACY	Paul Forst	pforst@appriss.com	316000000
XX1234567	1234321	Main Street Pharmacy	123 Test St Louisville KY 40223			Main Street Pharmacy	TestPharma LastPharma	noemail@noemail.com	800555555
SS1234768		Release 27 regression				Release 27 regression			

#### 6.4.4 Pharmacy Analysis

- The Pharmacy Analysis screen is a compliance report for an individual pharmacy. It conforms to the same principles of the Delinquent Pharmacies Report: static, runs daily, two days back, etc., but provides a more granular view of the pharmacy’s submission history.
- The report is filtered by quarter. Quarter can be changed by clicking the dropdown above the graph.
- The graph is set to display 30 days of data. It can be changed to 60 or 90 days by clicking the dropdown beneath Submission Requirement.
- The graph is interactive. Hover over a section of the graph to view that section in the submission history table.
- Missing days are marked in red on the graph and in the table.

## Pharmacy Analysis



### 6.4.5 Compliance Reporting FAQs

**Q: Why do I get “No Pharmacy Found” when I input a pharmacy’s DEA/NCPDP into the Pharmacy Analysis report?** For a pharmacy to be included in compliance reporting, they must be in the “Manage Pharmacies” table. If the pharmacy does not appear there when searching, add it via the “Add Pharmacies” screen. AWARe will then start to track compliance for the pharmacy. If the pharmacy is found in the “Manage Pharmacies” screen, verify the DEA/NCPDP associated with that facility is correct and that is the number the facility is actually using in their report submissions.

**Q: Why are there pharmacies listed on the Delinquent Report that have the “Last” and/or “Days” columns blank?** These are dispensers that are listed in your “Manage Pharmacies” table. Any dispenser listed in this table is considered “active” in that they should be reporting their controlled substance dispensations. If a dispenser is out of business or not required to report, then they should either be deleted from the “Manage Pharmacies” table or marked as exempt.

**Q: Are zero reports factored in to compliance reporting?** Yes, as long as the zero report is submitted within the compliance time frame, it will be included in compliance reporting like an actual dispensation report.

**Q: A pharmacy states they have been reporting but they are on the Delinquency report and I don’t see any dispensations under “Pharmacy Analysis”.** The pharmacy is either not submitting under the DEA/NCPDP number that is associated with them under the “Manage Pharmacies” screen or the

pharmacy's submissions contain ASAP or dispensation errors that is preventing the records from being imported. Files rejected due to error are not reflected on the compliance reports.

**Q: Why can I see filled prescriptions for a dispenser on a particular day on the “Dispenser Activity Report” or normal patient report, but that same dispenser is showing as delinquent on that same day in the “Pharmacy Analysis Report”?** The most likely explanation is the dispenser submitted those records outside of the compliance window for the given day. The “Dispenser Activity Report” as well as the other reports in the PMP have no compliance constraints. They will show all dispensation records regardless of when they were submitted.

**Q: Why can I see current day records on other reports, such as the patient report, but not on the “Delinquent/Pharmacy Analysis Report”?** The other reports in AWA<sub>RxE</sub> are ad hoc and return the most current data available, so that healthcare professionals can make the most informed decisions. The compliance reports are static reports, run once daily, and are used by administrators to determine the reporting status of dispensers.

## 6.5 User Administration

User Administration is broken into three subsections, Registration, Roles, and Users.

The Registration tab allows you to manage pending registrations. The Users tab allows you to manage all user accounts that have been approved, even deactivated accounts. Only pending registrations are stored in the Registration section and are removed if they are rejected.

The Roles tab allows you to modify the site permissions for individual roles. For details on modifying role permissions, see the PMP Administrator Configuration Guide.

The Users tab and the Registration tab are extremely similar and function in the same way. They only differ in three ways: In Registration, you have a column for email verification, where as in the User section, there is instead a column for user status (Active/Inactive). And in the User's section, beneath the Account Options menu, you can manually modify a user's permissions by clicking the "Permissions" link. Other than that, they can be managed much the same.

To access the Registration or Users listing:

1. Navigate to **Admin > User Administration** and click the **Registration** or **Users** tab.
2. For Registration, pending registrations will be displayed on screen, sorted from oldest to newest, and for Users, you can click the advanced option tab to locate a user.

Support: 1-866-Appriss

Registration	Roles	Users
Advanced Options ▾		Search

## User

Select a user to view details

First	Last	Birthday	Role	Identifier	Email	Validation	Delegate	Registration Date
testing	testing	09/09/2000	Nurse Practitioner / Clinical Nurse Specialist	Invalid	Unverified	Not Required	None	07/05/2016
Test	Test	01/01/1900	Pharmacist with Prescriptive Authority	Invalid	Unverified	Not Required	None	12/16/2016
test	user	01/05/1980	Physician (MD, DO)	Invalid	Unverified	Not Required	None	04/03/2017
Testing	Documents	01/01/1900	Physician (MD, DO)	Invalid	Unverified	Not	None	04/17/2017

### Column Descriptions

**Identifier Status:** PMP AwarxE will display a valid or invalid status in this column based on the validity and verification of any identifiers on the account. If one identifier fails validation, the status in the column will be "Invalid."

**Note:** Individual identifier validity can be viewed in the address card by clicking anywhere within the row for the associated account.

**Email:** Denotes whether the user has verified their email address by clicking the link sent to their email upon registering.

**Note:** If you wish to send another email verification link to a user who has not verified their email address, click the “Account Options” button in the user’s address card and click the “Send Verification Email” button.

**Delegate:** None – non-delegate, pending, approved, or rejected

3. If you need to search for an individual’s pending registration or account, you can search or filter by any of the following fields:

Advanced Options ▾

FIRST NAME %test%

Search

First Name: %test%

Last Name:

Email:

Birthday: MM/DD/YYYY

Role: ▾

Personal DEA:

National Provider ID:

Identifier Status: ☐ Invalid ☐ Valid

Delegate Status: ☐ None ☐ Pending ☐ Approved

Validation Status: ☐ Not Required ☐ Pending ☐ Complete

Identifier	Email	Validation	Delegate	Registration Date
Invalid	Unverified	Not Required	None	07/05/2016
Invalid	Unverified	Not Required	None	12/16/2016
Invalid	Unverified	Not Required	None	01/17/2017
Invalid	Unverified	Not Required	None	04/03/2017
Invalid	Unverified	Not Required	None	04/17/2017
Invalid	Unverified	Not Required	Pending	05/03/2017

4. Once you have located the user you wish to approve, reject or modify, click anywhere within the row for the user to display the user’s address card, which displays and allows for the editing of additional demographic information, and allows you to, if you are in Registrations, reject or approve the user, or in Users, activate or deactivate a user.

test test

Account Options ▾

Deactivate

Role: Licensing Board Investigator

Phone: 5552227777

Email: nelmoro777@gmail.com (Unverified)

Validation

0 Supervisors

First	Last	Birthday	Role	Identifier	Email	Validation	Delegate	Registration Date	
John Test	Jones	01/01/1900	Physician (MD, DO)	Invalid	Unverified	Pending	None	01/17/2017	^
test	user	01/05/1980	Physician (MD, DO)	Invalid	Unverified	Complete	None	04/03/2017	
Testing	Documents	01/01/1900	Physician (MD, DO)	Invalid	Unverified	Pending	None	04/17/2017	
Test	Man	12/18/1900	Prescriber Delegate - Unlicensed	Invalid	Unverified	Not Required	Pending	05/03/2017	
Test	Tester	12/19/1900	Prescriber Delegate - Unlicensed	Invalid	Verified	Not Required	Pending	05/03/2017	
Test	Delegate	01/01/1980	Prescriber Delegate - Unlicensed	Invalid	Unverified	Not Required	Pending	05/12/2017	v

**John Test A Jones**
Account Options
Reject
Approve

**Role:** Physician (MD, DO)  
**Phone:** 5023445678  
**Email:** testtester1@gmail.com (Unverified)  
**Address:** 10405 Linn Station suite 400  
Louisville, KY 40223  
**Date of Birth:** 01/01/1900

**Validation**  
Manage  
**Delegate (none)**  
**Personal DEA**  
MB0001001  
**National provider (invalid)**  
908988223  
**Drivers license (valid)**  
1032458745  
**Professional license (invalid)**  
45895987

**0 Supervisors**  
**0 Delegates**  
**Healthcare Specialty**  
★ Allopathic & Osteopathic Physicians  
Anesthesiology

5. For this user we can see that their registration is complete but they have not verified their Email address as their email status is unverified. We can also see that they have not submitted required validation documents as their Validation status is pending. Additionally we can see that their DEA, NPI and Professional License Number are all invalid. Note that Professional License Numbers are only validated with the Auto-Licensing feature.
6. If we are working with this user and they entered their information incorrectly, we can modify a pending registration or an active user account at any time.
  - a. **Role changes:** To change a user's role, click the role link in the address card. Uncheck the previous role, and check the correct role. Then click "Save Changes."

### User

Select a user to view details

First	Last
John Test	Jones
test	user
Testing	Documents
Test	Man
Test	Tester
Test	Delegate

<

#### John Test A Jones

**Role:** Physician (MD, DO)  
**Phone:** 5023445678  
**Email:** testtester1@gmail.com  
**Address:** 10405 Linn St  
Louisville, KY 40223  
**Date of Birth:** 01/01/1900

### Select roles for John Test A Jones

**Healthcare Professional**

- ☐ Chiropractor
- ☒ Physician (MD, DO)
- ☐ Midwife with Prescriptive Authority
- ☐ Optometrist
- ☐ Naturopathic Physician
- ☐ Pharmacist in Charge
- ☐ Psychologist
- ☐ Veterinarian
- ☐ Medical Intern
- ☐ Medical Resident
- ☐ IHS Prescriber
- ☐ IHS Dispenser
- ☐ Military Prescriber
- ☐ VA Prescriber
- ☐ VA Dispenser

Update User Roles

- b. **Account changes:** To modify demographic information on a user’s account, click “Account Options” then “Edit Demographics.” There you will be able to edit all information on the user’s address card, however it is restricted to the registration requirements for the role.

### Edit Demographics for John Test A Jones

All fields with an asterisk (\*) are required.

Personal

DEA Number(s) \*

MB0001001

DEA Suffix

+ Add

DEA Numbers Added

✖ MB0001001

National Provider ID

908988223

AutoFill Form

Drivers License Number

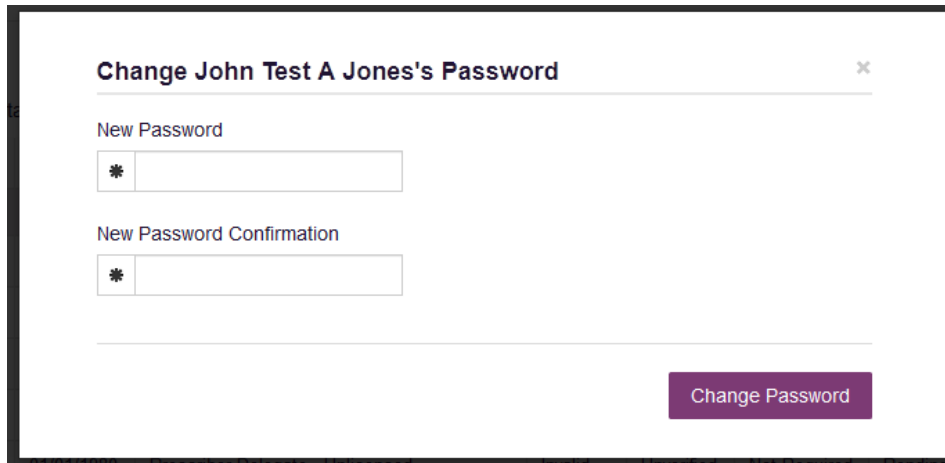
Update User Demographics

It is important to note for account changes that email addresses that already exist on an account can not be reused. The email address would first need to be removed from the original account if you are trying to add it to another. Depending on your states settings, identifiers like DEA numbers, NPI numbers, and professional licenses numbers can work in the same way as well to prevent account duplication.



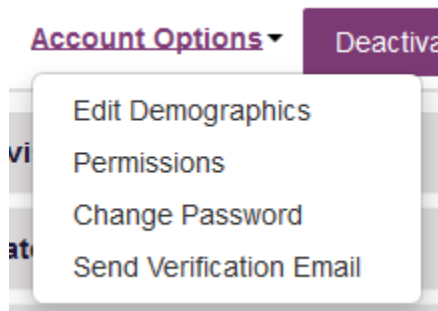
7. We can also manually reset users' passwords, resend email verifications (if the email is unverified) and modify user permissions for active (not pending registration) users.

**Password Reset:** Click Account Options > Change Password. Enter a password for the user. Passwords must be at least 8 characters and must contain a capital letter and a symbol. Passwords cannot be one of the user's last 12 passwords.



The screenshot shows a web form titled "Change John Test A Jones's Password" with a close button (X) in the top right corner. The form contains two input fields: "New Password" and "New Password Confirmation". Each field has a small icon of a capital letter 'A' and a symbol '#' to the left of the text input area. At the bottom right of the form is a purple button labeled "Change Password".

**Resending the verification link:** In the address card, click "Account Options," then click "Send Verification Email."



**Modifying user permissions:** Permissions can only be modified on approved users, and can be modified from the Account Options Menu by clicking "Permissions."

Here you can customize an individual user's permissions if you do not wish to change the settings for an entire role. Make sure that you expand each line item when enabling to ensure that you've checked all necessary requirements. Then click "Save Changes."

test test's Permissions

Configure Admin Permissions

	Access	Export	Approval?	Admin
Insight	✓			
+ New Reports	✓	✓	⊘	
Reports History	✓			
Reports Processing	⊘			
+ RxSearch	✓			
Home	✓			
Dashboard	✓			
Quick Links	✓			
PMP Announcements	–			
+ Data	–			
Medical Marijuana Search				

Restore Defaults

Save User Permissions

## 7 Document Information

### 7.1 Disclaimer

Appriss has made every effort to ensure the accuracy of the information in this document at the time of printing. However, information may change without notice.